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## ESTIMATED WORLD PRODUCTION OF LEAF TOBACCO HARVESTED IN CALENDAR YEAR 1953, WITH COMPARISONS--FARM SALES WEIGHT 1/

Total 1953 production for specified countries in the tables below is estimated at 7,324 million pounds. This is slightly above the amount harvested in 1952 even with the large decline in U. S. output in 1953, and is about 90 million pounds greater than the 1947-51 annual average. The acreage harvested in 1953 was about the same as in 1952 and the overall average yield per acre was slightly up from the previous year.

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### PRODUCTION BY AREAS

### North America

Production for 1953 is estimated at 2,441 million pounds, down about 200 million from 1952 and slightly below the 1947-51 annual average. This is due primarily to smaller acreage and lower average yield in the United States. There were increases in output in Mexico and throughout Central America. Favorable prices in 1952 and the general demand situation for cigar leaf stimulated the production of cigar tobaccos in the Carribean area (particularly Cuba, Dominican Republic and Puerto Rico).

### South America

Estimated 1953 production at 435.8 million pounds for South America establishes a new record high output. This is about 6.8 percent above 1952 and 15 percent greater than the annual average during the 1947-51 period. Nearly all the increase over 1952 is due to larger production in Brazil and Argentina. This was brought about chiefly through expanded acreages and higher yields in important flue-cured producing areas in southern Brazil and improved yields in Argentina. Production of Bahia cigar in northern Brazil was far below normal due to severe drought conditions during the December 1952-March 1953 period.

### Europe (including the U. S. S. R.)

Production in 1953 is estimated at 1,237 million pounds compared to 1,102 million in 1952. Production in the U. S. S. R. was estimated at 450 million pounds in both 1952 and 1953 although little is known about the exact levels of

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1/ Data relative to the quantities of tobacco grown and consumed at home without entering commercial channels are not available. Farm sales weight averages about ten percent more than the "declared weight" normally reported in export statistics. Does not include Manchuria.

output. Increases in 1953 relative to 1952 were especially pronounced in Greece, Yugoslavia, Bulgaria and Hungary. Higher levels of production in 1953 were general throughout South Eastern Europe where severe drought conditions prevailed in 1952. Significant increases were also reported for France, Germany and Spain.

## Asia

Total 1953 production in Asia (excluding Manchuria) is estimated at 2,923 million pounds or about 4.4 percent above 1952, but still slightly below the annual average during the 1947-51 period.

Acreages and production in Turkey, Iran, India and Japan were up substantially from 1952 levels. Combined production of India and Pakistan is still below levels reported in the 1935-39 period but much of this may be due to differences in methods of estimating production. While little is known in regard to China, the most important country in Asia insofar as tobacco production is concerned, it is reported that tobacco yields are again, as in 1952, below normal due to unfavorable weather conditions.

## Africa

The estimated production for 1953 is 274.7 million pounds. Output was 267.7 million pounds in 1952, averaged 235.5 million pounds annually in the 1947-51 period and amounted to about 126.9 million annually during 1935-39. These data indicate the continuation of a steep upward trend in Southern Rhodesia, Northern Rhodesia, and Nyasaland. The Union of South Africa also experienced an upward climb in output during this period, but had a decline in 1953 as compared to 1952 when output was abnormally high.

## Oceania

Estimated output for 1953 is 11.6 million pounds, a decline of 1.9 million compared to 1952. This is due primarily to the lower average yields in Australia.

## Summary

The continuing upward trend in the southern part of Africa (primarily Southern Rhodesia, Northern Rhodesia, Nyasaland and Union of South Africa), Southern Brazil, Argentina, Canada, Cuba, Dominican Republic, Greece and Turkey and the recent decline in cigar leaf output of Indonesia as compared to the pre-independence period appear to be the outstanding recent developments insofar as shifting patterns of production for export are concerned.

Recent increases in production to fulfill domestic needs are particularly important in various Western European countries (especially Italy, France and Spain), as well as in Argentina, Canada, Japan, Taiwan (Formosa) and Thailand.

At the same time that these developments were taking place total U. S. production has increased greatly but there has been a major shift in pattern insofar as proportion of production for export is concerned. The percentage of total U. S. production exported has declined substantially in recent years, particularly as the various African countries indicated above have increased shipments to the United Kingdom as well as to other Western European countries.

## PRODUCTION BY KIND OF TOBACCO

The categories indicated in the accompanying tables represent an attempt to put tobaccos into groups similar to those employed in the United States. Wherever possible they are put in groups which are made up of leaf which is similar in regard to physical characteristics. On the basis of such information certain evaluations can be made relative to use and substitutability as well as trend by major categories. The classification includes separate groups for flue-cured, light air-cured, dark air-cured, light sun-cured, dark sun-cured, fire-cured, and oriental-semi-oriental. There is no separate major classification for cigar types as in the U. S. but wherever sufficient information is available such sub-classes are shown under the appropriate major groups.

### 1. Flue-cured (Virginia or Bright)

Flue-cured has a very thin leaf and is lemon-yellow to red in color. Also the veining and midrib are very fine. Curing is done with indirect heat circulated through flues (pipes) throughout the curing barn. Flue-cured tobacco is primarily used in cigarettes.

World production (excluding Manchuria) is estimated at 2,210 million pounds or about 49 million less than in 1952. Average annual production in the 1947-51 period was about 2,024 million pounds. Due to adverse weather conditions and a smaller acreage in 1953, production in the United States was about 114 million pounds less than in 1952. Likewise because of poor weather conditions in India and Canada, production was slightly lower than in 1952. Increases as compared to 1952 were especially large in Brazil, Japan and Southern Rhodesia Also the continued upward trends in production in recent years are important in Canada, Northern Rhodesia, Union of South Africa, Argentina, Italy, Germany, India, Taiwan (Formosa), Thailand, and many other areas.

### 2. Light air-cured

There are a large number of categories of light air-cured tobaccos but for present purposes they were divided into two subgroups, Burley, and "other light air-cured" with the latter including Maryland.

#### (a) Burley

Burley has a characteristic yellowish-tan color, but varies from light lemon to dark reddish brown with the lighter colored leaves in the center and near the bottom of the stalk. The leaf is fairly thin with the center leaves 18 to 22 inches long and growing close together on the stalk.

In the U. S. the thin, lighter grades suitable for fine cutting are used primarily in cigarette blends. The heavy, dark red leaves or tips (small leaves at the top of the plant) are strong and are not used for smoking purposes in the U. S. These "tips" are suitable for the absorption of large quantities of licorice, sugar, and other materials and in the U. S. are used primarily in chewing tobacco. The medium-bodied, well-ripened leaves are often preferred for pipe tobacco.

The U. S. produces over 90 percent of the world's Burley. Total Burley production for 1953 was estimated at 616 million pounds as compared to 689 in 1952. This decline is due almost entirely to the decrease in

U. S. output as indicated by estimated production of 575 million pounds in 1953 as compared to 650 million in 1952.

World production increased rapidly from the mid 1930's until the late 1940's and in some countries continues to expand slightly. However, output has changed little in most countries in the last 4 or 5 years and during this period has actually declined in Canada and Japan.

(b) Other light air-cured

This category includes all light air-cured types except Burley, but where sufficient information is available, Maryland is shown separately in the accompanying tables.

Maryland is similar to Burley in body but slightly darker in color. Also, the leaves often are thicker and somewhat more erect on the stalk. It is used primarily in cigarettes, but some is used as cigar filler.

Many other kinds of light air-cured are "native varieties" or crosses and are used in a wide variety of tobacco products. In Brazil light air-cured leaf is used primarily in "rope twist" chewing tobacco, whereas in other countries it is used in cigarette blends, pipe mixtures and sometimes cigars.

Total estimated production of "other light air-cured" of 251.3 million pounds in 1953 is about the same as in 1952. Production continues to rise particularly in Brazil, Argentina, and Spain, while the average annual output of Maryland leaf produced in the U. S. has not changed materially in the last 10 years. Madagascar produces significant quantities of Maryland tobacco chiefly for export to Western Europe.

3. Dark air-cured

Dark air-cured in the United States is used in pipe tobacco and cigars as well as in cigarette blends. Artificial heat during the curing process is sometimes employed in periods of dampness when there is danger of "burning."

In the U. S. there are two classes of dark air-cured leaf; one-sucker, and Green River, although there are separate classes for U. S. cigar types they are included here in dark air-cured as corresponding breakdowns are not available in most other countries.

(a) One-sucker

One-sucker has long, narrow leaf with an excessively heavy, thick midrib. The cured leaf is very dark brown and is fairly strong. Its chief use is for chewing tobacco, although some is used in lower-priced cigars.

(b) Green River

Green River has a broader and heavier leaf than One-sucker and is slightly lighter in color. It is used primarily in chewing tobacco and to a limited extent in smoking tobacco and snuff.

World production for dark air-cured for 1953 is estimated at 2,453 million pounds, about 2 percent below 1952 and only 80 percent of the 1935-39 annual average.

This represents a continuation of the long term trends of decline in use of smoking tobaccos and shift to lighter types for cigarettes. This is offset to some extent in the last couple of years by increased output of cigar types as reflecting the recently improved demand for cigars.

## 4. Light sun-cured

This kind of tobacco is named after the practice of allowing it to wilt and yellow in the sun. Sometimes it is left to almost completely cure in the sun or open air while in other areas it is placed under cover as soon as it is "yellowed."

Most light sun-cured is produced in Asia and is used for pipe tobacco, but some is also used in cigars as well as cigarette mixtures.

In some countries the sun-cured types are "native" or "native-improved" varieties. In other areas improved types which are similar to air-cured varieties are sun-cured; but in Asia, especially in certain areas of India and China, the usual flue-cured (Virginia bright) varieties are sun-cured on farms where flue-curing facilities are not available.

World production for 1953 is estimated at 585 million pounds, slightly below that for 1952 but about 10 percent below the annual average for 1947-51. Most of this kind of leaf is produced in China with the bulk of the remainder grown in Mexico, Korea and India. Output in China, Korea and India declined from the levels reached during the 1947-51 period.

## 5. Dark sun-cured

In the U. S. there is only one kind of sun-cured tobacco and this is "Virginia sun-cured" which could almost be classed as air-cured as it is moved to barns almost as soon as yellowing begins. With regard to its characteristics Virginia sun-cured lies between One-sucker and Burley. Formerly, its chief use in the U. S. was as wrapper for plug chewing tobacco but it is now also used in other tobacco products.

In many other countries dark sun-cured types are used in cigars, pipe tobacco and snuff, and sometimes in cigarette mixtures. In Asia and Africa small "garden" plantings are often sun-cured for use at home.

"Native Nicotiana Rustica" is a relatively small, coarse, thick-leaved variety used chiefly for snuff and extraction of nicotine, and is usually sun-cured or air-cured. The plant lacks the comparative refinement in appearance of the other varieties mentioned.

Estimated 1953 production of 285 million pounds was about 4.5 percent below that in 1952 and 9.5 percent below the average annual output for 1947-51. The increase in output in 1953 is due to slightly greater production in India. The decrease in 1953 as compared to the 1947-51 annual average is due largely to smaller production in China and native (natu) leaf in India.

## 6. Fire-cured

This kind of leaf is so named because it is subjected to direct heat and smoke from smoldering fire. Most fire-cured types are dark, relatively heavy and strong tobaccos but some cigar types as well as oriental and "light" varieties are sometimes cured by direct fires.

In the U. S. there are two classes which are fire-cured. Kentucky-Tennessee Dark (Type 22-23) and Virginia fire-cured (type 21). Kentucky-Tennessee leaf is dark in color, rich in gum, and has a pronounced smoky odor. It is cured with smoldering fires at moderate temperatures and is subject to a maximum amount of smoke. Virginia fire-cured is lighter in color and less impregnated with smoke. It is cured with high heat with a minimum amount of smoke. Fire-cured tobaccos produced in the U. S. are used chiefly for snuff and strong cigars. Some is used in chewing tobacco and small amounts are used in smoking tobacco and cigarettes, particularly in France.

Production in 1953 is estimated at 120 million pounds, slightly below the 1952 level, and only about 75 percent of the 1935-39 annual average. This largely reflects a continuation of the long-term downward trend in consumption of pipe tobacco. Fire-cured data do not include fire-cured oriental (Latakia), fire-cured shade-grown cigar wrapper produced in Cuba, and that portion of the sun-cured leaf in China which is partially fire-cured after "yellowing."

### 7. Oriental and Semi-oriental

Although the above differentiations are based primarily on the method of curing combined with color and other important characteristics of the leaf, it was thought that the characteristics and uses of oriental and semi-oriental are such that, the tobacco trade would be interested in total production of this kind of leaf regardless of the method of curing employed.

These tobaccos are generally air-cured, although some countries produce "Latakia" fire-cured or sun-cured oriental tobacco. Its chief use is in the manufacture of cigarettes. Color of the cured leaf ranges from a light straw-yellow to yellow-red with brownish overtones. The leaf is relatively small and elongated-oval, with not too prominent veining and a comparatively thin midrib. Most oriental tobaccos are native to Turkey although a few are said to be native to Greece, Bulgaria, and Russia.

Semi-oriental tobaccos usually are a result of "crossing" oriental varieties with other improved types, usually light air-cured tobaccos, to produce a lighter-bodied and finer leaf.

Total world production of 802 million pounds in 1953 was 25 percent above 1952 and one-tenth above the 1947-51 annual average. Larger output in 1953 is due primarily to greatly increased production in Turkey and Greece. Production throughout Southeastern Europe was generally higher in 1953 than in 1952 chiefly as a result of better growing conditions. Also, due to greatly expanded acreage, production in Iran was about 60 percent greater in 1953 than in 1952.

## CIGAR LEAF

Although reports from many countries do not include breakdowns by type of cigar leaf, a description of each class is given here as it is hoped that in the future data for such categories may be supplied.

In the U. S. all cigar tobaccos are air-cured, although sometimes fire is used in damp weather. In some countries certain types of cigar leaf are fire-cured or sun-cured. Some cigar leaf, especially wrappers, is shade-grown (under light cotton cloth).

(a) Cigar Fillers

Filler tobacco is used for the core of the cigar. It is coarse in texture, heavy in body and has a more pronounced aroma than cigar binder and wrapper.

(b) Cigar Binders

Binder tobacco is used to bind and shape the filler. It is comparatively fine and elastic in texture, and makes possible the use of a very thin, attractive wrapper on the cigar.

(c) Cigar Wrappers

The wrapper is very fine leaf used for covering the binder. These are relatively elastic, free from gum and blemishes, and have inconspicuous veining. This type of leaf commands the highest price of all cigar types.

TOBACCO: Estimated production in specified countries, harvested in calendar year 1953 with comparison - farm sales weight

| Kinds | Average | | | |
|---|---|---|---|---|
| | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-cured | 1,261,518 | 2,024,311 | 2,258,670 | 2,209,903 |
| Burley | 335,252 | 600,577 | 688,966 | 616,237 |
| Other light air-cured | 153,468 | 185,577 | 252,494 | 251,300 |
| Light sun-cured | 563,123 | 658,272 | 588,079 | 585,021 |
| Dark sun-cured | 289,248 | 314,745 | 272,643 | 285,430 |
| Dark air-cured | 3,099,896 | 2,561,703 | 2,410,766 | 2,453,478 |
| Fire-cured | 163,609 | 153,064 | 121,145 | 120,444 |
| Oriental including semi-oriental | 652,883 | 732,765 | 637,051 | 802,081 |
| Total | 6,518,997 | 7,231,014 | 7,229,814 | 7,323,894 |

1/ Preliminary

In the past, production was reported on a crop year basis. This report represents a change in that data are based on tobacco harvested in the calendar years specified.

TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1953 with comparisons - farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 2/ | 1935-39 | 1947-51 | 1952 | 1953 2/ | 1935-39 | 1947-51 | 1952 | 1953 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| **NORTH AMERICA:** | | | | | | | | | | | | |
| Canada | 69 | 113 | 91 | 102 | 1103 | 1144 | 1525 | 1339 | 76,556 | 129,445 | 139,719 | 135,100 |
| Costa Rica | - | 3 | 3 | 3 | - | 800 | 709 | 700 | - | 2,281 | 1,984 | 2,000 |
| El Salvador | 1 | 3 | 3 | 3 | - | 467 | 385 | 439 | 3/ 750 | 1,113 | 1,300 | 1,514 |
| Guatemala | 5 | 7 | 7 | 7 | 376 | 590 | 602 | 599 | 1,892 | 3,920 | 4,220 | 4,255 |
| Honduras | 7 | 11 | 15 | 16 | 606 | 684 | 500 | 509 | 3/ 4,500 | 7,915 | 7,250 | 8,205 |
| Mexico | 51 | 90 | 88 | 79 | 750 | 882 | 902 | 987 | 38,200 | 79,425 | 76,740 | 78,043 |
| Nicaragua | 1 | 1 | 1 | 1 | 900 | 775 | 900 | 900 | 500 | 755 | 650 | 600 |
| United States | 1,647 | 1,682 | 1,773 | 1,655 | 887 | 1,258 | 1,272 | 1,236 | 1,460,054 | 2,082,727 | 2,254,855 | 2,045,875 |
| Caribbean: | | | | | | | | | | | | |
| Cuba | 108 | 131 | 136 | 136 | 429 | 549 | 549 | 580 | 48,092 | 72,529 | 74,400 | 80,500 |
| Dominican Republic | 25 | 44 | 45 | 45 | 985 | 965 | 876 | 711 | 24,625 | 42,000 | 39,683 | 40,000 |
| Haiti | 37 | 19 | 19 | 19 | 350 | 400 | 400 | 400 | 13,000 | 7,700 | 7,500 | 7,500 |
| Jamaica | 2 | 6 | 6 | 6 | 460 | 460 | 470 | 480 | 1,000 | 2,600 | 2,700 | 2,800 |
| Puerto Rico | 44 | 35 | 34 | 36 | 673 | 769 | 844 | 976 | 29,393 | 26,921 | 28,527 | 34,810 |
| Total North America | 1,997 | 2,145 | 2,221 | 2,108 | - | - | - | - | 1,698,562 | 2,459,331 | 2,639,528 | 2,441,202 |
| EUROPE (Including U.S.S.R.) | | | | | | | | | | | | |
| Belgium | 6 | 5 | 5 | 6 | 2,500 | 1,924 | 2,150 | 2,052 | 16,431 | 9,432 | 12,050 | 11,510 |
| France | 44 | 70 | 69 | 70 | 1,676 | 1,557 | 1,515 | 1,650 | 72,995 | 109,070 | 104,625 | 115,500 |
| Germany, Western 4/ | 33 | 23 | 25 | 27 | 2,254 | 2,185 | 2,000 | 2,023 | 74,355 | 46,982 | 50,481 | 55,000 |
| Greece | 226 | 213 | 189 | 216 | 589 | 531 | 462 | 637 | 132,819 | 113,320 | 86,954 | 137,891 |
| Italy | 77 | 142 | 132 | 131 | 1,175 | 1,179 | 1,038 | 1,042 | 90,500 | 167,900 | 135,907 | 136,249 |
| Spain | 3/ 16 | 28 | 43 | 50 | 3/ 1,100 | 1,244 | 1,325 | 1,200 | 3/ 17,322 | 34,425 | 57,264 | 60,000 |
| Sweden | 1 | 1 | 5/ | 5/ | 1,735 | 1,526 | 1,516 | 1,400 | 1,061 | 859 | 622 | 550 |
| Switzerland | 1 | 3 | 3 | 3 | 1,571 | 1,844 | 1,940 | 2,100 | 2,276 | 4,689 | 4,850 | 5,291 |
| Yugoslavia | 39 | 89 | 71 | 70 | 969 | 673 | 460 | 700 | 37,410 | 59,622 | 32,705 | 50,000 |
| Total Western Europe | 443 | 574 | 537 | 573 | - | - | - | - | 445,169 | 546,299 | 485,458 | 571,991 |
| Albania 6/ | 5 | 5 | 4 | 4 | 826 | 1,000 | 1,000 | 750 | 4,082 | 5,000 | 3,000 | 3,000 |
| Bulgaria 6/ | 94 | 72 | 60 | 65 | 809 | 1,030 | 833 | 1,000 | 75,871 | 75,871 | 50,000 | 65,000 |
| Czechoslovakia 6/ | 24 | 15 | 15 | 20 | 1,288 | 1,280 | 1,200 | 1,000 | 31,143 | 17,950 | 18,000 | 20,000 |
| Hungary 6/ | 37 | 39 | 45 | 50 | 1,238 | 1,102 | 555 | 800 | 45,872 | 42,990 | 25,000 | 40,000 |
| Poland 6/ | 17 | 33 | 40 | 40 | 1,664 | 1,324 | 1,125 | 1,125 | 25,566 | 43,703 | 45,000 | 45,000 |
| Rumania 6/ | 44 | 66 | 55 | 82 | 647 | 513 | 454 | 514 | 28,697 | 35,935 | 25,000 | 42,200 |
| U.S.S.R. (Europe and Asia) 6/ | 3/ 490 | 520 | 520 | 520 | 1,129 | 865 | 865 | 865 | 3/ 525,000 | 450,000 | 450,000 | 450,000 |
| Total Eastern Europe (Incl.U.S.S.R.in Asia) | 711 | 750 | 739 | 781 | - | - | - | - | 736,231 | 671,449 | 616,000 | 665,200 |
| Total Europe (Incl.U.S.S.R.in Asia) | 1,154 | 1,324 | 1,276 | 1,354 | - | - | - | - | 1,181,400 | 1,217,748 | 1,101,458 | 1,237,191 |
| ASIA (Excluding U.S.S.R.) | | | | | | | | | | | | |
| Asia Minor: | | | | | | | | | | | | |
| Cyprus | 5/ | 3 | 4 | 4 | - | 460 | 400 | 400 | 90 | 1,390 | 1,680 | 1,800 |
| Iran | 35 | 40 | 40 | 66 | 990 | 722 | 756 | 609 | 34,542 | 29,355 | 29,652 | 40,829 |
| Iraq | 3/ 11 | 10 | 16 | 16 | 3/ 752 | 1,137 | 629 | 687 | 3/ 8,057 | 11,728 | 11,023 | 11,000 |
| Lebanon | 7/ 4 | 3/ 5 | 7 | 6 | 7/ 600 | 3/ 705 | 570 | 600 | 7/ 2,350 | 3/ 3,525 | 3,818 | 3,748 |
| Syria | 7/ 11 | 3/ 16 | 20 | 17 | 7/ 730 | 3/ 719 | 730 | 819 | 7/ 8,250 | 3/ 11,510 | 14,652 | 14,965 |
| Turkey | 194 | 304 | 320 | 400 | 661 | 638 | 629 | 650 | 128,505 | 194,109 | 200,619 | 260,143 |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Asia Major: | | | | | | | | | | | | |
| Burma | 108 | 129 | 134 | 135 | 726 | 690 | 760 | 746 | 78,400 | 88,800 | 100,448 | 100,800 |
| Ceylon | 3/ 14 | 3/ 10 | 15 | 15 | 3/ 615 | 3/ 573 | 550 | 553 | 9,000 | 3/ 5,730 | 8,000 | 8,300 |
| China 8/ | 1,228 | 3/1,402 | 1,400 | 1,400 | 1,021 | 1,017 | 930 | 930 | 1,254,539 | 1,425,000 | 1,300,000 | 1,300,000 |
| India | 9/ 917 | 812 | 712 | 798 | 9/ 830 | 674 | 645 | 615 | 9/ 761,000 | 547,150 | 459,200 | 490,560 |
| Pakistan | 9/ 355 | 172 | 179 | 178 | 9/ 913 | 910 | 934 | 930 | 9/ 324,053 | 156,511 | 167,171 | 165,500 |
| Indochina | 44 | 3/ 25 | 30 | 30 | 3/ 728 | 3/ 600 | 670 | 667 | 3/ 32,004 | 3/ 15,000 | 20,000 | 20,000 |
| Indonesia | 449 | 3/ 178 | 349 | 350 | 532 | 350 | 319 | 300 | 3/ 238,775 | 3/ 62,230 | 111,400 | 105,000 |
| Japan | 92 | 129 | 136 | 156 | 1,621 | 1,619 | 1,548 | 1,585 | 148,680 | 208,092 | 210,585 | 247,226 |
| Korea | 46 | 3/ 44 | 37 | 40 | 1,239 | 3/1,302 | 1,000 | 1,000 | 57,304 | 3/ 59,080 | 37,200 | 39,500 |
| Philippine Republic | 176 | 111 | 115 | 89 | 474 | 552 | 560 | 602 | 82,292 | 62,066 | 64,670 | 54,005 |
| Taiwan (Formosa) | 4 | 14 | 14 | 14 | 1,458 | 972 | 1,385 | 1,361 | 5,961 | 13,740 | 19,387 | 19,373 |
| Thailand | 3/ 53 | 83 | 106 | 107 | 3/ 489 | 424 | 385 | 380 | 3/ 25,900 | 35,200 | 40,824 | 40,637 |
| Total Asia (Excl. U.S.S.R.) | 3,741 | 3,487 | 3,634 | 3,821 | - | - | - | - | 3,199,702 | 2,930,216 | 2,500,329 | 2,923,386 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 29 | 67 | 92 | 92 | 965 | 926 | 868 | 917 | 27,983 | 61,140 | 79,890 | 84,436 |
| Brazil | 250 | 337 | 385 | 382 | 811 | 692 | 612 | 687 | 202,703 | 233,120 | 237,442 | 262,347 |
| Chile | 9 | 9 | 8 | 6 | 1,846 | 1,670 | 1,759 | 1,702 | 16,618 | 14,719 | 13,428 | 10,974 |
| Colombia | 3/ 37 | 47 | 49 | 50 | 3/ 803 | 958 | 982 | 980 | 3/ 31,697 | 45,027 | 48,501 | 48,500 |
| Paraguay | 22 | 16 | 17 | 17 | 808 | 1,150 | 900 | 908 | 17,792 | 18,438 | 15,800 | 15,701 |
| Uruguay | 1 | 1 | 1 | 1 | 860 | 967 | 977 | 980 | 1,254 | 957 | 613 | 700 |
| Venezuela | 10 | 8 | 16 | 16 | 825 | 826 | 730 | 844 | 7,700 | 6,224 | 11,613 | 13,138 |
| Total South America | 358 | 485 | 568 | 564 | - | - | - | - | 305,747 | 379,625 | 407,287 | 435,796 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 56 | 75 | 67 | 64 | 691 | 582 | 668 | 660 | 38,667 | 44,671 | 43,920 | 46,300 |
| Kenya | 10/ | 3 | 2 | 2 | 10/ | - | 550 | - | 10/ - | 1,540 | 1,182 | 1,190 |
| Nyasaland | 10/ | 126 | 164 | 167 | 10/ | 226 | 140 | 196 | 15,752 | 28,626 | 22,936 | 32,790 |
| Tanganyika | 3 | 8 | 12 | 12 | 345 | 382 | 475 | 500 | 920 | 4,588 | 5,550 | 6,000 |
| Uganda | 4 | 8 | 14 | 14 | 350 | 400 | 400 | 415 | 1,500 | 4,080 | 5,525 | 5,815 |
| French Morocco | 1 | 1 | 5 | 5 | 1,040 | 1,027 | 1,080 | 1,130 | 704 | 1,278 | 5,940 | 6,220 |
| Madagascar | 19 | 12 | 20 | 20 | 764 | 642 | 500 | 489 | 14,164 | 7,190 | 10,299 | 9,722 |
| Mauritius | 5/ | 1 | 1 | 1 | 1,200 | 1,215 | 1,410 | 1,600 | 500 | 758 | 1,075 | 1.391 |
| Mozambique | 3/ 1 | 4 | 4 | 4 | 3/ 385 | 400 | 399 | 400 | 3/ 467 | 1,535 | 1,478 | 1,500 |
| Nigeria | 1 | 2 | 5 | 5 | 500 | 500 | 600 | 600 | 300 | 800 | 3;300 | 3,530 |
| Northern Rhodesia | 4 | 15 | 27 | 20 | 486 | 410 | 472 | 465 | 1,585 | 6,130 | 9,752 | 10,493 |
| Southern Rhodesia | 50 | 136 | 190 | 180 | 504 | 626 | 525 | 560 | 26,150 | 84,698 | 99,770 | 105,500 |
| Tunisia | 1 | 2 | 4 | 4 | 1,200 | 1,100 | 900 | 900 | 1,262 | 2,205 | 3,600 | 3,600 |
| Union of South Africa | 47 | 93 | 85 | 86 | 523 | 510 | 503 | 505 | 24,972 | 47,421 | 53,387 | 40,648 |
| Total Africa | 187 | 486 | 600 | 584 | - | - | - | - | 126,943 | 235,520 | 267,714 | 274,699 |
| OCEANIA: | | | | | | | | | | | | |
| Australia | 10 | 5 | 8 | 8 | 532 | 789 | 932 | 770 | 5,276 | 3,649 | 7,603 | 5,870 |
| New Zealand | 2 | 4 | 4 | 4 | 787 | 1,265 | 1,615 | 1,643 | 1,367 | 4,925 | 5,895 | 5,750 |
| Total Oceania | 12 | 9 | 12 | 12 | - | - | - | - | 6,643 | 8,574 | 13,498 | 11,620 |
| Total world 8/ | 7,449 | 7,936 | 8,311 | 8,443 | - | - | - | - | 6,518,997 | 7,231,014 | 7,229,814 | 7,323,894 |

1/ Farm sales weight is about 10 percent above the average dry weight which is normally reported in export trade statistics. 2/ Preliminary. 3/ Less than a 5 - year average. 4/ In the case of Germany, data are for Western Germany, only. 5/ Less than 500 acres. 6/ Estimated from unofficial information for all periods except 1935-39. 7/ Separate data not available for 1935-39. 8/ Does not include Manchuria. 9/ Recently methods of estimating acreage and production have been changed in an effort to improve data, therefore data for 1935-39 are not comparable with later information. 10/ Not available.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

FLUE-CURED TOBACCO: Estimated acreage, and production in specified countries harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 51 | 98 | 86 | 97 | 1,070 | 1,142 | 1,534 | 1,319 | 54,616 | 111,646 | 131,965 | 128,000 |
| Costa Rica | - | 2/ | 2/ | 2/ | - | 344 | 300 | 300 | - | 44 | 143 | 143 |
| El Salvador | 2/ | 2 | 2 | 2 | - | 345 | 347 | 388 | 50 | 700 | 900 | 1,086 |
| Guatemala | 2/ | 1 | 1 | 1 | - | 580 | 580 | 770 | 132 | 390 | 406 | 431 |
| Honduras | 2/ | 2/ | 1 | 1 | - | 405 | 347 | 345 | - | 120 | 250 | 205 |
| Mexico | 1 | 4 | 4 | 5 | 810 | 890 | 872 | 954 | 700 | 3,579 | 3,847 | 4,299 |
| Nicaragua | - | 1 | 1 | 1 | - | 850 | 800 | 800 | - | 615 | 580 | 600 |
| United States | 976 | 1,010 | 1,111 | 1,031 | 876 | 1,229 | 1,229 | 1,214 | 863,619 | 1,246,160 | 1,365,341 | 1,251,087 |
| EUROPE: | | | | | | | | | | | | |
| Germany | - | - | - | - | - | - | - | - | - | 1,500 | 6,957 | 9,000 |
| Italy | | | | | | | | | | | | |
| Bright Italia | 2 | 8 | 15 | 15 | 1,900 | 1,963 | 1,719 | 1,672 | 3,800 | 16,100 | 24,956 | 24,383 |
| Spain | - | 28 | 43 | 50 | - | 1,244 | 1,325 | 1,200 | - | 800 | 1,100 | 1,200 |
| Poland | 5 | 10 | 12 | 12 | 1,534 | 1,311 | 1,163 | 1,163 | 7,670 | 13,111 | 13,500 | 13,500 |
| ASIA: | | | | | | | | | | | | |
| Turkey | - | - | - | - | - | - | - | 500 | - | - | - | 600 |
| Burma | - | 2/ | 1 | 1 | - | 700 | 747 | 713 | - | 88 | 448 | 784 |
| Ceylon | - | 1 | 2 | 2 | - | 475 | 550 | 600 | - | 950 | 1,100 | 1,200 |
| China | 150 | 302 | 300 | 300 | 1,006 | 830 | 830 | 830 | 150,900 | 250,000 | 260,000 | 260,000 |
| Cyprus | - | 2/ | 2/ | 2/ | - | - | - | - | - | 8 | 8 | 8 |
| India | 61 | 120 | 160 | 150 | 440 | 532 | 460 | 455 | 26,900 | 64,510 | 75,000 | 68,000 |
| Indochina | - | 2/ | 1 | 1 | - | - | 500 | 500 | - | 450 | 550 | 550 |
| Pakistan | - | 3 | 3 | 5 | - | 696 | 900 | 890 | - | 1,865 | 2,700 | 5,000 |
| Indonesia | - | 14 | 24 | 24 | - | - | 275 | 368 | - | 350 | 6,615 | 8,815 |
| Japan | | | | | | | | | | | | |
| Va. Yellow | 46 | 58 | 79 | 96 | 1,616 | 1,500 | 1,392 | 1,490 | 74,340 | 86,887 | 110,260 | 143,094 |
| Korea | 15 | 13 | 12 | 13 | 1,456 | 1,400 | 1,083 | 1,192 | 21,839 | 18,990 | 13,000 | 15,500 |
| Philippine Republic | 1 | 2 | 6 | 5 | 550 | 647 | 580 | 481 | 342 | 1,320 | 3,412 | 2,425 |
| Taiwan | 3 | 14 | 14 | 14 | 1,200 | 944 | 1,385 | 1,361 | 3,751 | 13,220 | 19,387 | 19,373 |
| Thailand | 3 | 29 | 60 | 63 | 280 | 300 | 300 | 280 | 900 | 8,200 | 16,824 | 17,637 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 1 | 9 | 12 | 12 | 1,000 | 887 | 947 | 974 | 599 | 7,983 | 11,210 | 11,687 |
| Brazil | 10 | 35 | 35 | 45 | 1,200 | 1,299 | 757 | 1,432 | 12,549 | 45,498 | 26,455 | 58,697 |
| Chile | 2/ | 2/ | 1 | 2/ | - | 1,464 | 1,349 | 1,304 | 203 | 478 | 677 | 683 |
| Venezuela | - | 3 | 7 | 7 | - | 881 | 800 | 892 | - | 2,724 | 5,895 | 6,367 |
| AFRICA: | | | | | | | | | | | | |
| Nyasaland | 5 | 5 | 7 | 7 | 443 | 539 | 494 | 521 | 2,217 | 2,696 | 3,460 | 3,650 |
| Tanganyika | 2/ | 4 | 5 | 5 | - | 515 | 560 | 600 | 10 | 2,060 | 2,800 | 3,000 |
| Mozambique | - | 3 | 3 | 3 | - | 383 | 393 | 400 | - | 1,150 | 1,178 | 1,200 |
| Nigeria | - | 2/ | 1 | 1 | - | - | 500 | 500 | - | 200 | 500 | 530 |
| Northern Rhodesia | 4 | 13 | 25 | 27 | 450 | 425 | 478 | 472 | 1,500 | 5,415 | 9,524 | 10,323 |
| Southern Rhodesia | 46 | 130 | 189 | 179 | 509 | 633 | 524 | 603 | 24,623 | 82,321 | 98,969 | 105,000 |
| Mauritius | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 300 | 514 | 718 | 869 |
| Union of South Africa | | | | | | | | | | | | |
| Amorello | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 2,715 | 19,335 | 2,053 | 2,312 |
| Orinoco | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 600 | 2,500 | 19,990 | 14,470 |
| Uganda | - | 3/ | 3/ | 3/ | - | 3/ | 3/ | 3/ | - | 160 | 1,644 | 1,725 |
| Kenya | - | 3 | 2 | 3 | - | 400 | 500 | 400 | - | 1,200 | 1,000 | 1,000 |
| OCEANIA: | | | | | | | | | | | | |
| Australia | 10 | 5 | 8 | 8 | 532 | 789 | 932 | 770 | 5,276 | 3,649 | 7,603 | 5,870 |
| New Zealand | 2 | 4 | 4 | 4 | 650 | 1,200 | 1,275 | 1,245 | 1,367 | 4,825 | 5,745 | 5,600 |
| Total | - | - | - | - | - | - | - | - | 1,261,518 | 2,024,311 | 2,258,670 | 2,209,903 |

See footnotes at end of circular.

LIGHT AIR-CURED BURLEY TOBACCO: Estimated acreage and production in specified countries harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 9 | 8 | 1 | 1 | 1,195 | 1,183 | 1,673 | 1,500 | 10,749 | 10,040 | 2,352 | 2,100 |
| Costa Rica | - | 2/ | 2/ | 2/ | - | - | - | - | - | 1 | 2 | 2 |
| Guatemala | - | 2/ | 2/ | 2/ | - | 721 | 800 | 718 | - | 120 | 163 | 172 |
| Mexico | 2/ | 1 | 1 | 1 | - | 1,400 | 1,387 | 1,518 | 300 | 1,700 | 893 | 1,561 |
| United States | 372 | 433 | 463 | 429 | 839 | 1,277 | 1,403 | 1,341 | 315,826 | 552,736 | 650,148 | 574,695 |
| EUROPE: | | | | | | | | | | | | |
| Germany | - | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | - | 5,500 | 6,500 | 6,500 |
| Italy | 2 | 6 | 5 | 7 | 2,200 | 2,283 | 2,109 | 1,806 | 4,600 | 13,700 | 11,243 | 12,942 |
| Switzerland | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 694 | 1,641 | 1,697 | 1,852 |
| ASIA: | | | | | | | | | | | | |
| India | - | 3 | 3 | 3 | - | 500 | 500 | 500 | - | 1,640 | 1,500 | 1,650 |
| Japan | 2 | 5 | 2 | 2 | 1,480 | 1,734 | 1,900 | 1,917 | 2,974 | 8,982 | 5,066 | 3,904 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 2/ | 1 | 1 | 1 | 638 | 500 | 600 | 615 | 99 | 496 | 600 | 615 |
| Brazil | - | 1 | 4 | 4 | - | 1,200 | 1,100 | 1,200 | - | 1,000 | 4,300 | 4,300 |
| Chile | - | 2/ | 2/ | 2/ | - | 1,650 | 1,202 | 1,480 | - | 171 | 101 | 190 |
| Venezuela | - | 2 | 3 | 5 | - | 873 | 670 | 742 | - | 1,550 | 2,301 | 3,684 |
| AFRICA: | | | | | | | | | | | | |
| Nyasaland | - | 2 | 3 | 3 | - | 475 | 600 | 600 | - | 950 | 1,800 | 1,800 |
| Northern Rhodesia | 2/ | 1 | 1 | 1 | - | - | - | - | 10 | 250 | 150 | 120 |
| OCEANIA: | | | | | | | | | | | | |
| New Zealand | - | 2/ | 2/ | 2/ | - | - | - | - | - | 100 | 150 | 150 |
| Total | - | - | - | - | - | - | - | - | 335,252 | 600,577 | 688,966 | 616,237 |

See footnotes at end of circular.

OTHER LIGHT AIR-CURED TOBACCO: Estimated acreage and production in specified countries harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | | | | | | | | | | | | |
| Maryland | 37 | 49 | 51 | 47 | 769 | 795 | 775 | 825 | 28,845 | 39,112 | 39,525 | 38,775 |
| EUROPE: | | | | | | | | | | | | |
| Italy | | | | | | | | | | | | |
| Maryland | 1 | 3 | 4 | 4 | 2,500 | 2,600 | 2,245 | 2,099 | 3,400 | 7,800 | 8,598 | 8,818 |
| Spain | - | - | - | - | - | - | - | - | 3,000 | 6,425 | 26,164 | 28,800 |
| Switzerland | - | - | - | - | - | - | - | - | 582 | 1,407 | 1,456 | 1,587 |
| Yugoslavia | 2 | 4 | 4 | 4 | 935 | 745 | 409 | 625 | 1,870 | 2,981 | 1,636 | 2,500 |
| Czechoslavakia | 1 | 1 | 1 | 1 | 900 | 900 | 900 | 920 | 1,557 | 897 | 900 | 1,000 |
| U. S. S. R. | 59 | 62 | 62 | 62 | 1,068 | 900 | 900 | 900 | 63,000 | 54,000 | 54,000 | 54,000 |
| ASIA: | | | | | | | | | | | | |
| Syria | | | | | | | | | | | | |
| Va. & Burley | - | 2/ | 1 | 2/ | - | 680 | 693 | 693 | - | 40 | 309 | 300 |
| Cyprus | | | | | | | | | | | | |
| Yellow leaf | 2/ | 2 | 3 | 3 | - | 500 | 430 | 430 | 40 | 1,087 | 1,260 | 1,300 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | | | | | | | | | | | | |
| Maryland | 1 | 1 | 1 | 1 | 800 | 500 | 600 | 615 | 596 | 489 | 600 | 615 |
| Native | 3 | 5 | 10 | 10 | 1,220 | 1,022 | 1,187 | 1,230 | 4,388 | 6,109 | 11,720 | 12,302 |
| Brazil | 12 | 30 | 40 | 41 | 1,150 | 1,100 | 1,163 | 1,263 | 13,800 | 33,000 | 68,657 | 69,445 |
| Paraguay | | | | | | | | | | | | |
| Flojo | 16 | 13 | 13 | 13 | 834 | 1,040 | 908 | 905 | 13,344 | 14,038 | 11,800 | 11,775 |
| AFRICA: | | | | | | | | | | | | |
| French Morocco | 2/ | 1 | 4 | 4 | - | 800 | 1,100 | 1,100 | 500 | 878 | 4,630 | 4,850 |
| Madagascar | | | | | | | | | | | | |
| Maryland | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 12,764 | 6,240 | 9,199 | 8,722 |
| Union of South Africa | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 5,722 | 11,000 | 12,012 | 6,491 |
| Northern Rhodesia 4/ | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 60 | 74 | 28 | 20 |
| Total | - | - | - | - | - | - | - | - | 153,468 | 185,577 | 252,494 | 251,300 |

See footnotes at end of circular.

FIRE-CURED TOBACCO: Estimated acreage, yield and production in specified countries, harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Average | | | | Average | | | | Average | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000. acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA | | | | | | | | | | | | |
| United States | | | | | | | | | | | | |
| Va. fire-cured | 23 | 11 | 10 | 10 | 810 | 1,165 | 1,250 | 925 | 18,804 | 13,005 | 12,250 | 9,250 |
| Kentucky-Tennessee | 105 | 51 | 38 | 40 | 813 | 1,124 | 1,185 | 1,017 | 84,733 | 56,803 | 45,967 | 42,002 |
| EUROPE | | | | | | | | | | | | |
| Italy | 25 | 37 | 27 | 26 | 1,596 | 1,378 | 1,349 | 1,366 | 39,900 | 51,400 | 35,869 | 35,097 |
| Poland | 2/ | 1 | 1 | 1 | - | 875 | 900 | 900 | 511 | 874 | 900 | 900 |
| ASIA | | | | | | | | | | | | |
| Ceylon (chewing & snuff) | 4 | 3 | 2 | 2 | 700 | 680 | 700 | 630 | 2,800 | 1,360 | 1,600 | 1,750 |
| SOUTH AMERICA | | | | | | | | | | | | |
| Argentina | 1 | 3 | 3 | 3 | 880 | 824 | 845 | 900 | 1,069 | 2,473 | 2,560 | 2,705 |
| AFRICA | | | | | | | | | | | | |
| Nyasaland | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 12,746 | 20,976 | 15,464 | 22,100 |
| Tanganyika | 1 | 3 | 3 | 3 | 650 | 675 | 733 | 800 | 890 | 2,021 | 2,200 | 2,400 |
| So. Rhodesia | 9 | 2 | 1 | 1 | 475 | 595 | 495 | 530 | 862 | 932 | 642 | 350 |
| Uganda | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 1,294 | 3,220 | 3,693 | 3,890 |
| TOTAL | | | | | | | | | 163,609 | 153,064 | 121,145 | 120,444 |

See footnotes at end of circular.

DARK AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | | | | | | | | | | | | |
| Cigar | 4 | 4 | 2 | 2 | 1,243 | 1,230 | 1,227 | 1,100 | 5,102 | 5,000 | 2,639 | 2,500 |
| Other | 5 | 3 | 2 | 2 | 1,060 | 1,051 | 938 | 900 | 6,089 | 2,759 | 2,763 | 2,500 |
| El Salvador | | | | | | | | | | | | |
| (Incl. cigar & shade) | 1 | 1 | 1 | 1 | 650 | 625 | 578 | 655 | 700 | 413 | 400 | 428 |
| Guatemala | 5 | 6 | 6 | 6 | 400 | 579 | 630 | 580 | 1,760 | 3,410 | 3,651 | 3,652 |
| Honduras | | | | | | | | | | | | |
| Dark air & sun-cured: copan | 7 | 11 | 14 | 15 | 600 | 686 | 509 | 518 | 4,500 | 7,795 | 7,000 | 8,000 |
| Mexico | 37 | 48 | 46 | 40 | 667 | 700 | 707 | 774 | 25,000 | 34,100 | 31,000 | 31,217 |
| Nicaragua | | | | | | | | | | | | |
| Chilcagre | 1 | 2/ | 2/ | - | 400 | 415 | - | - | 500 | 140 | 70 | - |
| Dominican Republic | | | | | | | | | | | | |
| Criollo & Orlor | 25 | 44 | 45 | 45 | 985 | 965 | 876 | 880 | 24,625 | 42,000 | 39,683 | 40,000 |
| Puerto Rico | | | | | | | | | | | | |
| Cigar | 44 | 35 | 34 | 36 | 673 | 769 | 844 | 976 | 29,393 | 26,921 | 28,527 | 34,810 |
| United States | | | | | | | | | | | | |
| One sucker | 21 | 17 | 15 | 16 | 844 | 1,138 | 1,348 | 1,071 | 18,959 | 19,228 | 20,090 | 16,715 |
| Green River | 19 | 10 | 8 | 8 | 838 | 1,082 | 1,250 | 1,025 | 15,788 | 11,147 | 10,000 | 8,405 |
| Cigar filler | 42 | 43 | 29 | 30 | 1,273 | 1,517 | 1,550 | 1,357 | 53,575 | 64,583 | 44,795 | 40,578 |
| Cigar binder | 43 | 40 | 31 | 33 | 1,462 | 1,536 | 1,539 | 1,544 | 47,836 | 61,065 | 48,311 | 47,103 |
| Cigar wrapper | 10 | 14 | 13 | 12 | 955 | 1,064 | 1,125 | 1,144 | 9,108 | 15,233 | 14,508 | 13,725 |
| Perique | 2/ | 1 | 2/ | 2/ | 454 | 646 | 600 | 700 | 192 | 325 | 180 | 140 |
| Haiti | 37 | 19 | 19 | 19 | 350 | 400 | 400 | 400 | 13,000 | 7,700 | 7,500 | 7,500 |
| Jamaica | 2 | 6 | 6 | 6 | 460 | 460 | 470 | 480 | 1,000 | 2,600 | 2,700 | 2,800 |
| EUROPE: | | | | | | | | | | | | |
| Belgium | 6 | 5 | 5 | 6 | 2,500 | 1,924 | 2,150 | 2,052 | 16,431 | 9,432 | 12,050 | 11,510 |
| France | | | | | | | | | | | | |
| Lege | 40 | 67 | 68 | 68 | 1,665 | 1,550 | 1,510 | 1,645 | 65,700 | 103,570 | 102,775 | 112,000 |
| Other | 4 | 3 | 1 | 2 | 1,800 | 1,750 | 1,700 | 1,800 | 7,295 | 5,500 | 1,850 | 3,500 |
| Germany | | | | | | | | | | | | |
| Cigar-Havana and Guerdentheimer | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 41,000 | 25,800 | 27,000 | 28,000 |
| Other | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 33,355 | 14,182 | 10,024 | 11,500 |
| Italy | | | | | | | | | | | | |
| Beneventano | 3 | 6 | 7 | 7 | 1,433 | 1,161 | 1,037 | 1,012 | 4,300 | 7,200 | 7,540 | 7,253 |
| Nostrano | 2 | 5 | 8 | 10 | 1,458 | 1,540 | 1,400 | 1,285 | 3,500 | 7,700 | 11,067 | 12,390 |
| Blending | 1 | 1 | 2/ | 2/ | 760 | 2,000 | 1,120 | 990 | 500 | 200 | 37 | 49 |
| Snuff & nicotine | 2/ | 2/ | 2/ | 2/ | - | 1,500 | 1,622 | 1,622 | 600 | 900 | 485 | 485 |
| Sub-tropical | 1 | 7 | 4 | 4 | 1,500 | 1,515 | 1,386 | 1,416 | 1,600 | 10,000 | 5,930 | 5,952 |
| Spain | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 14,322 | 27,200 | 30,000 | 30,000 |
| Sweden | 1 | 1 | 2/ | 2/ | 1,735 | 1,526 | 1,516 | 1,400 | 1,061 | 859 | 622 | 550 |
| Switzerland | | | | | | | | | | | | |
| Nostrano, Brenta, Monte | 1 | 1 | 1 | 1 | 3/ | 3/ | 3/ | 3/ | 1,000 | 1,641 | 1,697 | 1,852 |
| Yugoslavia | | | | | | | | | | | | |
| Cigar & dark air-cured | 8 | 18 | 14 | 14 | 936 | 662 | 467 | 714 | 7,483 | 11,924 | 6,540 | 10,000 |
| Albania | 5 | 5 | 4 | 4 | 800 | 1,000 | 750 | 750 | 4,082 | 5,000 | 3,000 | 3,000 |
| Czechoslovakia | 13 | 8 | 8 | 11 | 1,600 | 1,680 | 1,680 | 1,365 | 23,357 | 13,463 | 13,500 | 15,000 |
| Hungary | 33 | 35 | 41 | 45 | 1,250 | 1,105 | 550 | 800 | 41,285 | 38,691 | 22,500 | 36,000 |
| Poland | 11 | 21 | 26 | 26 | 1,510 | 1,350 | 1,125 | 1,125 | 16,618 | 28,407 | 29,250 | 29,250 |
| Rumania | 7 | 10 | 8 | 12 | 610 | 540 | 480 | 550 | 4,305 | 5,391 | 3,750 | 6,330 |
| U. S. S. R. | | | | | | | | | | | | |
| Mahorka | 230 | 244 | 244 | 244 | 1,075 | 869 | 869 | 869 | 247,000 | 212,000 | 212,000 | 212,000 |
| Cigar | 20 | 22 | 22 | 22 | 1,050 | 818 | 818 | 818 | | 18,000 | 18,000 | 18,000 |
| ASIA: | | | | | | | | | | | | |
| Iran | | | | | | | | | | | | |
| Tumbeki - water pipe | 6 | 3 | 3 | 2 | 1,460 | 1,322 | 1,342 | 1,338 | 9,772 | 3,993 | 4,079 | 2,977 |
| Syria | | | | | | | | | | | | |
| Tombac | 1 | 1 | 1 | 1 | 800 | 805 | 820 | 820 | 820 | 800 | 800 | 800 |
| Turkey | 1 | 1 | 1 | 1 | 350 | 350 | 350 | 350 | 386 | 360 | 580 | 800 |
| Burma | 108 | 129 | 133 | 134 | 726 | 689 | 760 | 752 | 78,400 | 88,712 | 100,000 | 100,016 |
| Ceylon (incl. cigar) | 10 | 6 | 11 | 11 | 580 | 560 | 500 | 504 | 6,200 | 3,420 | 5,300 | 5,350 |
| China | | | | | | | | | | | | |
| Cigar types | 501 | 500 | 500 | 500 | 1,026 | 1,000 | 880 | 880 | 514,003 | 500,000 | 440,000 | 440,000 |
| India | 666 | 522 | 410 | 503 | 960 | 770 | 785 | 712 | 629,260 | 402,000 | 320,700 | 357,910 |
| Indochina | 44 | 25 | 29 | 29 | 727 | 580 | 670 | 670 | 32,004 | 14,550 | 19,450 | 19,450 |
| Pakistan | 355 | 169 | 176 | 173 | 912 | 915 | 934 | 925 | 324,053 | 154,646 | 164,471 | 160,500 |
| Indonesia | 449 | 164 | 325 | 326 | 532 | 376 | 323 | 300 | 238,775 | 61,880 | 104,785 | 96,185 |
| Japan | | | | | | | | | | | | |
| Native | 44 | 66 | 55 | 58 | 1,621 | 1,505 | 1,727 | 1,732 | 71,366 | 112,223 | 95,259 | 100,228 |
| Philippine Republic | 175 | 109 | 109 | 84 | 466 | 545 | 558 | 608 | 81,950 | 60,746 | 61,258 | 51,580 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **SOUTH AMERICA:** |  |  |  |  |  |  |  |  |  |  |  |  |
| Argentina |  |  |  |  |  |  |  |  |  |  |  |  |
| Native | 21 | 43 | 57 | 57 | 914 | 917 | 879 | 894 | 19,387 | 39,449 | 48,600 | 50,976 |
| Other | 2 | 6 | 8 | 8 | 779 | 690 | 550 | 692 | 1,645 | 4,141 | 4,400 | 5,536 |
| Brazil |  |  |  |  |  |  |  |  |  |  |  |  |
| Cigar | 94 | 89 | 80 | 78 | 850 | 588 | 539 | 527 | 80,000 | 58,350 | 48,030 | 39,000 |
| Twist | 134 | 182 | 226 | 214 | 741 | 523 | 422 | 425 | 96,354 | 95,272 | 90,000 | 90,905 |
| Chile |  |  |  |  |  |  |  |  |  |  |  |  |
| Paraguay | 7 | 6 | 5 | 4 | 1,850 | 1,899 | 1,882 | 1,741 | 12,024 | 11,171 | 9,266 | 6,217 |
| Cigar | 2 | 2 | 2 | 2 | 1,845 | 1,294 | 1,595 | 1,745 | 4,391 | 2,899 | 3,384 | 3,884 |
| Colombia |  |  |  |  |  |  |  |  |  |  |  |  |
| Native Criollo | 37 | 47 | 49 | 50 | - | - | - | - | 21,697 | 29,200 | 29,500 | 29,500 |
| Cigar (Cubita) | 37 | 47 | 49 | 50 | - | - | - | - | 10,000 | 15,827 | 19,001 | 19,000 |
| Paraguay |  |  |  |  |  |  |  |  |  |  |  |  |
| Fuerte | 6 | 3 | 4 | 4 | 741 | 1,100 | 1,000 | 981 | 4,448 | 4,400 | 4,000 | 3,926 |
| Uruguay | 1 | 1 | 1 | 1 | 860 | 967 | 977 | 980 | 1,254 | 957 | 613 | 700 |
| Venezuela | - | 3 | 6 | 4 | - | 604 | 800 | 892 | 7,700 | 1,950 | 3,417 | 3,087 |
| **AFRICA:** |  |  |  |  |  |  |  |  |  |  |  |  |
| Algeria | 29 | 40 | 34 | 32 | 700 | 590 | 690 | 680 | 21,667 | 23,271 | 21,880 | 23,100 |
| Tanganyika | - | - | - | - | - | - | - | - | 20 | 507 | 550 | 600 |
| French Morocco | 2/ | 2/ | 1 | 1 | - | - | 1,300 | 1,300 | 204 | 400 | 1,310 | 1,370 |
| Madagascar |  |  |  |  |  |  |  |  |  |  |  |  |
| Corse | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 1,400 | 950 | 1,100 | 1,000 |
| Mozambique |  |  |  |  |  |  |  |  |  |  |  |  |
| Air & sun-cured | 1 | 1 | 1 | 1 | 385 | - | - | - | 467 | 385 | 300 | 300 |
| Nigeria | 1 | 2 | 4 | 4 | - | 500 | 700 | 750 | 300 | 600 | 2,800 | 3,000 |
| Tunisia |  |  |  |  |  |  |  |  |  |  |  |  |
| Arbi | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 360 | 650 | 900 | 900 |
| Souffi | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 902 | 1,555 | 2,700 | 2,700 |
| Union of South Africa | - | - | - | - | - | - | - | - | 15,160 | 13,676 | 17,972 | 16,375 |
| Uganda | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 206 | 700 | 188 | 200 |
| Kenya | 3/ | 3/ | 3/ | 3/ | - | - | - | - | - | 340 | 182 | 190 |
| Mauritius | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 200 | 244 | 357 | 522 |
| TOTAL | - | - | - | - | - | - | - | - | 3,099,896 | 2,561,703 | 2,410,766 | 2,453,478 |

See footnotes at end of circular.

LIGHT **SUN-CURED** TOBACCO: **Estimated acreage, yield and production in specified countries harvested in calendar year 1953 with comparison**

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Costa Rica | - | 3 | 2 | 2 | - | 806 | 800 | 800 | - | 2,236 | 1,839 | 1,855 |
| Mexico | 13 | 37 | 37 | 33 | 921 | 1,098 | 1,127 | 1,233 | 12,200 | 40,046 | 41,000 | 40,966 |
| ASIA: | | | | | | | | | | | | |
| China 5/ | 491 | 525 | 500 | 500 | 1,022 | 1,048 | 1,000 | 1,000 | 501,818 | 550,000 | 500,000 | 500,000 |
| India 6/ | 20 | 40 | 35 | 30 | 440 | 525 | 455 | 445 | 9,640 | 21,000 | 16,000 | 13,000 |
| Korea | 31 | 31 | 25 | 27 | 1,145 | 1,293 | 968 | 890 | 35,465 | 40,090 | 24,200 | 24,000 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 7 | 7 | 8 | 8 | 600 | 514 | 600 | 600 | 4,000 | 4,900 | 5,040 | 5,200 |
| Total | - | - | - | - | - | - | - | - | 563,123 | 658,272 | 588,079 | 585,021 |

See footnotes at end of circular.

DARK SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries, harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | 3 | 3 | 3 | 4 | 844 | 1,012 | 1,100 | 850 | 2,769 | 3,330 | 3,740 | 3,400 |
| Cuba | | | | | | | | | | | | |
| Vuelta Abajo 7/ (wrapper, binder, filler) | 42 | 51 | 54 | 54 | 468 | 603 | 649 | 685 | 19,669 | 30,630 | 35,000 | 39,400 |
| Semi-Vuelta (filler) | 6 | 8 | 8 | 8 | 365 | 418 | 510 | 542 | 2,188 | 3,589 | 4,200 | 4,400 |
| Remedios (filler) | 56 | 67 | 68 | 68 | 413 | 501 | 447 | 474 | 23,106 | 33,869 | 29,600 | 31,000 |
| Partido (shade grown wrapper) 7/ | 2 | 3 | 3 | 3 | 682 | 710 | 708 | 750 | 1,364 | 2,280 | 2,600 | 2,800 |
| Oriente (cigarette & chewing) | 2 | 2 | 3 | 3 | 883 | 953 | 904 | 958 | 1,765 | 2,161 | 3,000 | 2,900 |
| ASIA | | | | | | | | | | | | |
| Iran | | | | | | | | | | | | |
| Pipe | 14 | 9 | 6 | 6 | 990 | 867 | 892 | 892 | 14,370 | 7,862 | 5,291 | 5,290 |
| China 4/ | 86 | 125 | 100 | 100 | 1,021 | 1,000 | 1,000 | 1,000 | 87,818 | 125,000 | 100,000 | 100,000 |
| India | | | | | | | | | | | | |
| Natu | 170 | 127 | 104 | 112 | 560 | 460 | 442 | 456 | 95,200 | 58,000 | 46,000 | 50,000 |
| Taiwan | 1 | - | - | - | 2,000 | 1,330 | - | - | 2,210 | 520 | - | - |
| Thailand | 50 | 54 | 46 | 46 | 500 | 500 | 490 | 486 | 25,000 | 27,000 | 24,000 | 23,000 |
| AFRICA | | | | | | | | | | | | |
| Algeria | 20 | 28 | 25 | 24 | 660 | 690 | 680 | 735 | 13,000 | 16,500 | 17,000 | 18,000 |
| Nyasaland | 3 | 16 | 21 | 23 | 263 | 250 | 105 | 228 | 789 | 4,004 | 2,212 | 5,240 |
| TOTAL | - | - | - | - | - | - | - | - | 289,248 | 314,745 | 272,643 | 285,430 |

See footnotes at end of circular.

ORIENTAL TOBACCO (including semi-oriental): Estimated acreage, yield and production in specified countries harvested in calendar year 1953 with comparison

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ | 1935-39 | 1947-51 | 1952 | 1953 1/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| EUROPE: |  |  |  |  |  |  |  |  |  |  |  |  |
| Greece |  |  |  |  |  |  |  |  |  |  |  |  |
| Turkish | 226 | 213 | 189 | 216 | 589 | 531 | 462 | 637 | 132,819 | 113,320 | 86,954 | 137,891 |
| Italy |  |  |  |  |  |  |  |  |  |  |  |  |
| Semi-oriental | 40 | 69 | 62 | 58 | 725 | 762 | 485 | 499 | 28,300 | 52,900 | 30,182 | 28,880 |
| Yugoslavia |  |  |  |  |  |  |  |  |  |  |  |  |
| Oriental | 15 | 36 | 28 | 27 | 997 | 662 | 467 | 740 | 14,964 | 23,849 | 13,082 | 20,000 |
| Semi-oriental | 14 | 31 | 25 | 25 | 935 | 673 | 458 | 700 | 13,093 | 20,868 | 11,447 | 17,500 |
| Bulgaria | 94 | 8/ 72 | 55 | 60 | 809 | 1,030 | 767 | 1,200 | 75,871 | 7/ 75,871 | 50,000 | 65,000 |
| Czechoslovakia: Oriental | 5 | 3 | 3 | 4 | 600 | 583 | 600 | 550 | 3,000 | 1,750 | 1,700 | 1,900 |
| Semi-oriental | 5 | 3 | 3 | 4 | 646 | 617 | 620 | 625 | 3,229 | 1,840 | 1,900 | 2,100 |
| Hungary |  |  |  |  |  |  |  |  |  |  |  |  |
| Semi-oriental | 4 | 4 | 4 | 5 | 1,150 | 1,075 | 650 | 800 | 4,587 | 4,299 | 2,500 | 4,000 |
| Poland | 1 | 1 | 1 | 1 | 750 | 1,300 | 1,300 | 1,300 | 767 | 1,311 | 1,350 | 1,350 |
| Rumania |  |  |  |  |  |  |  |  |  |  |  |  |
| Semi-oriental | 35 | 53 | 44 | 66 | 655 | 542 | 455 | 512 | 22,957 | 28,748 | 20,000 | 33,760 |
| Oriental | 2 | 3 | 3 | 4 | 700 | 600 | 425 | 525 | 1,435 | 1,796 | 1,250 | 2,110 |
| U. S. S. R. |  |  |  |  |  |  |  |  |  |  |  |  |
| Oriental & Semi-oriental | 181 | 192 | 181 | 192 | 1,070 | 865 | 917 | 865 | 194,000 | 166,000 | 166,000 | 166,000 |
| ASIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Iran |  |  |  |  |  |  |  |  |  |  |  |  |
| Oriental Cigarette | 15 | 28 | 31 | 58 | 700 | 615 | 670 | 553 | 10,400 | 17,500 | 20,282 | 32,562 |
| Iraq | 8/ 11 | 10 | 16 | 16 | 7/ 752 | 1,137 | 629 | 687 | 7/ 8,057 | 11,728 | 11,023 | 11,000 |
| Lebanon |  |  |  |  |  |  |  |  |  |  |  |  |
| Oriental air-cured | 2 | 3 | 4 | 4 | 390 | 400 | 300 | 300 | 780 | 1,225 | 1,253 | 1,248 |
| Latakia 9/ | 2 | 2 | 3 | 2 | 785 | 1,100 | 850 | 1,200 | 1,570 | 2,300 | 2,565 | 2,500 |
| Syria |  |  |  |  |  |  |  |  |  |  |  |  |
| Abu Riha - Latakia 9/ | 5 | 7 | 9 | 6 | 875 | 875 | 893 | 1,225 | 4,300 | 6,100 | 8,294 | 7,965 |
| Oriental air-cured |  |  |  |  |  |  |  |  |  |  |  |  |
| Shak al Bent | 5 | 8 | 9 | 10 | 620 | 580 | 591 | 520 | 3,100 | 4,550 | 5,214 | 5,865 |
| Hasan Kayf | 2/ | 2/ | 2/ | 2/ | - | 685 | 700 | 700 | 30 | 20 | 35 | 35 |
| Turkey | 193 | 303 | 319 | 398 | 663 | 639 | 627 | 650 | 128,119 | 193,749 | 200,039 | 258,743 |
| Cyprus |  |  |  |  |  |  |  |  |  |  |  |  |
| Latakia - fumigated 9/ | 2/ | 1 | 1 | 1 | - | 300 | 250 | 400 | 50 | 295 | 412 | 492 |
| AFRICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Northern Rhodesia | 2/ | 1 | 1 | 2/ | - | - | - | - | 15 | 391 | 50 | 30 |
| Southern Rhodesia | 2 | 4 | 2/ | 2/ | 353 | 386 | 325 | 350 | 665 | 1,445 | 159 | 150 |
| Union of South Africa | 2 | 3 | 3 | 3 | 400 | 300 | 450 | 350 | 775 | 910 | 1,360 | 1,000 |
| TOTAL | - | - | - | - | - | - | - | - | 652,383 | 732,765 | 637,051 | 802,081 |

1/ Preliminary. 2/ Less than 500 acres. 3/ Not available. 4/ Includes some sun-cured. 5/ Includes some sun-cured that is also partially fire-cured. 6/ This is a flue-cured variety (Virginia). 7/ Includes shade grown wrapper which is fire-cured. 8/ Less than a five-year average. 9/ Latakia - fire-cured.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT-2-54 January 26, 1954

## MISCELLANEOUS WORLD TOBACCO TRADE DEVELOPMENTS

### First Modern Cigarette Factory to Open in Panama

Panama's first modern cigarette factory is expected to start operation early this year. The factory was built by the Panama Tobacco Company (Compania Panamena De Tabaco, S.A.) and is located in Panama City.

Most of the machinery to be used in the factory was produced in the United States. Blending leaf will be imported from the United States but the bulk of tobacco used will be grown locally. The latest official estimate of local tobacco production was 600,000 pounds (Agricultural Census of 1950). Most of this tobacco is described as very similar in quality to Pennsylvania Seed Leaf.

If run on a full production schedule (three 8-hour shifts) the company could produce enough cigarettes to meet local demand. At this date it is impossible to predict how popular the new brands will be and the effect that this new production will have on the consumption of imported cigarettes. However, with growing preference for American blend cigarettes it seems certain that greater emphasis will be placed on domestic production of these types. Also, especially in the short-run, larger quantities of light leaf may be imported.

### Flue-Cured Tobacco Seedlings in the Republic of the Philippines Damaged Severely

A typhoon accompanied by 10 to 26 inches of rainfall in the third week of November badly damaged or destroyed flue-cured tobacco plant beds in Ilocos Sur, La Union and Pangasinan. It is reported that plants which had already been transplanted in the fields were damaged to the extent of about 80 percent, 60 percent and 20 percent respectively in the provinces indicated above. The crop may have been replanted. Development in these areas will be followed closely and information distributed as soon as obtained.

### Minimum Prices Established for 1953 Canadian Burley Crop

Minimum average prices for Burley were fixed at $.30 per pound plus two cents for grading and tying. The markets opened on December 15th and a total of about 1.5 million pounds were expected to be marketed.

## Transplanting the Flue-Cured Crop Progressed Satisfactorily in Southern Rhodesia as Rainfall was Adequate

Rains which fell in November were sufficient to enable growers to make excellent progress in transplanting flue-cured crop.

The tobacco agreement between Southern Rhodesia and British buyers has been extended for a further 12 months to include 1958.

## Portugal Increases Import Duty Preferences for Light Tobaccos Produced in Overseas Colonies and Territories

In an effort to encourage production of light and semi-light tobaccos in their overseas colonies and territories the National Assembly on December 14, 1953 approved in toto a law increasing to 15 percent the import duty preference on light and semi-light tobaccos from such areas.

The present import duty on leaf tobacco from non-Portuguese possessions (the rate was increased 25 percent in 1949) is approximately eight cents per pound plus 60 percent ad valorum (value). There is a 10 percent preference in duties on all raw leaf imported from Portuguese colonies and overseas territories. Tobacco specialists indicate that it may not be practical to produce Burley in the Portuguese possessions, but that increased production of other light and semi-light tobaccos appears economically feasible. Significant quantities of dark tobacco are produced on San Miguel Island (Azores) which is part of metropolitan Portugal. Production is also expanding in the Portuguese territories of Angola and Mozambique (Africa).

## Indonesian Tobacco Exports Increase in the First Half of 1953

Exports of unmanufactured tobacco by Indonesia are estimated at 26.7 million pounds in the first six months of 1953. While this is a significant increase as compared to shipments in recent years, production and exports are still far below pre-independence levels. In the 1936-41 period the average level of exports was about 83 million pounds per year. Much of the estate lands which were formerly devoted to tobacco production have been "homesteaded" by the native population and is now being used chiefly for the production of food and feed crops.

## Guatemala Increases Excise Taxes on Cigarettes

Effective November 9, 1953 Guatemala increased excise taxes two cents per pack of 20 cigarettes manufactured entirely from tobacco produced in Guatemala and three cents per pack on cigarettes containing imported tobacco. It exempts cigarettes manufactured entirely from domestic tobaccos from the one cent tax per pack imposed in October 1947.

## France Increases Duties on Tobacco Products Imported by Individuals for Personal Use

November 25, 1953 France increased the duties on tobacco products for private accounts (...imported by individuals for personal use). The rates were raised 25 percent on smoking tobacco, 20 percent on Havana cigars and 16 2/3 percent on cigarettes. No changes were made on tobacco products imported by the Government Tobacco Monopoly.

## India May Produce Maryland Tobacco

It is reported that Indian tobacco production experts hope to begin producing limited quantities of Maryland tobacco under irrigation.

## Advance Buyer Interest Indicates That the Turkish Tobacco Crop Will Likely Be Sold Quickly

The Aegean area tobacco market at Izmir was scheduled to open January 11th. This area accounts for about half of the tobacco produced in Turkey. The Aegean area crop is estimated at about 135 million pounds or about one-eighth above that of last year.

It is reported that buyers were actively arranging for purchases in advance of the market opening. The strong advance interest of buyers probably indicates that the new crop will be sold quickly. Last year nearly all of the crop was sold the first week after the market opened.

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FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 3-54

February 1, 1954

# GEORGE W. THOMAS, JR., NAMED DIRECTOR OF FAS TOBACCO WORK

The appointment of George W. Thomas, Jr. as Director of the Tobacco and Tropical Products Division of the Foreign Agricultural Service has been announced today by the U. S. Department of Agriculture.

Gustave Burmeister, Assistant Administrator of the Foreign Agricultural Service in charge of market development, said the appointment represented further development of the program of the Foreign Agricultural Service to promote the export of United States tobacco and other farm export products.

It also is in conformity with plans of FAS to create a better understanding both in the United States and foreign countries of the important part tobacco plays in the field of international trade, and its importance as a revenue-producer to both exporting and importing nations.

Mr. Thomas has had wide experience in tobacco production and marketing work, and was Head of the Tobacco and Tropical Products Division in the Office of Foreign Agricultural Relations which the Foreign Agricultural Service replaced early in 1953. He has been Acting Director of the Division since the administrative reorganization of FAS last year.

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UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT-4-54 January 28, 1954

# PHILIPPINE'S CENTRAL BANK ALLOCATIONS OF EXCHANGE FOR 1954 IMPORTS OF LEAF TOBACCO

The Central Bank has allocated $6.5 million for imports of leaf tobacco in the first half of 1954. This makes possible the importation of 11,450,000 pounds of tobacco in the first half of 1954 which is the total amount for which import licenses would be granted for the entire 1954 calendar year under provisions of Republic Act 698.

Individual quotas will be determined on the basis of the 1952-53 specific taxes reported to the Bureau of Internal Revenue. If the bulk of the 11.45 million pounds of flue-cured leaf reaches the Philippines by June 1954, cigarette production probably will not drop significantly as manufacturers will likely continue to produce at the present rate on the assumption that Republic Act 698 may be modified. Although it is too early to determine whether or not any changes will be made in Republic Act 698, cigarette manufacturers presumably feel that the chances of modification are fairly good. At any rate, these manufacturers hope to continue operating at the present rate of production as long as flue-cured leaf tobacco is entering the Philippines in sufficient quantities.

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UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT-5-54 February 3, 1954

# INDIAN CENTRAL TOBACCO COMMITTEE DISCUSSES MEANS OF DISPOSING OF TOBACCO STOCKS [1]

At their Ninth Annual Meeting on December 5, 1953 the Indian Central Tobacco Committee reviewed the activities of the ICTC and discussed numerous problems in connection with the Indian Tobacco Trade. In these discussions, the problem of accumulation of tobacco stock, particularly of low-grade flue-cured and sun-cured tobaccos, was of considerable concern.

The Ministry of Food and Agriculture, Government of India (GOI), decided to appoint tobacco sales officers in the United Kingdom, in various other European countries and in certain Far Eastern countries in order to promote the sale of Indian tobacco. The ICTC resolved to request that tobacco be included as a separate item in future trade agreements. It was suggested that nicotine extraction plants be established as another means of disposing of accumulating stocks.

The ICTC discussed the problem of disseminating to tobacco growers information on improving methods of cultivation and curing of tobacco. The Committee now arranges courses of training in the Tobacco Research Institute for candidates sponsored by the Community Project Administration (GOI).

At the Ninth Annual Meeting the Committee adopted the following:

1. That GOI ban exports of tobacco on a consignment basis for a period of six months as an experimental measure. (This was adopted because large stocks of Indian tobacco had accumulated in foreign ports).

2. To form an advisory committee to assist tobacco sales officers to be appointed to foreign posts by the GOI.

3. Recommend that the GOI reduce excise duty on low-grade flue-cured tobacco.

4. Abolish the export duty on cigars in order to increase exports.

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[1] The Indian Central Tobacco Committee was constituted on November 28, 1945 as a corporate body under the GOI Ministry of Food and Agriculture, to improve and develop the production and marketing of tobacco and its products. Based chiefly on a recent report from the American Counsil, Madras, India.

5. That a unit of the Research Institute would visit farmers and demonstrate the cultivation, handling and curing of tobacco in order to encourage the adoption of improved practices (the committee decided to conduct contests in the cultivation of flue-cured and bidis tobaccos).

6. To locate a hookah and chewing tobacco research station at Pusa, Bihar.

7. To conduct a study of the grading and standardization of bidis tobacco.

8. To conduct an investigation of the possibilities of growing flue-cured tobacco in paddy fields.

9. Not to join the World Tobacco Association, at least at present.

Suggestions were made to the Ministry of Food and Agriculture (GOI) that in the future, all exports of tobacco be handled by state governments. However, the Committee did not adopt a resolution to this effect. In the discussion of this subject it was pointed out that China, the U.S.S.R. and Japan (who are the chief consumers of Indian tobacco) all handle the importation of tobacco through Government Tobacco Monopolies.

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT 6-54 February 11, 1954

# THAILAND TOBACCO PRODUCTION AND TRADE

Two kinds of tobacco are grown in Thailand. These are "flue-cured" and "native" dark tobacco.

## Flue-Cured

"Flue-cured" tobacco is produced (1) on plantations owned and operated by the Thai Tobacco Monopoly and cured in Monopoly owned curing stations, (2) on plantations owned and operated by private owners and cured in stations under the same ownership and with the entire production being contracted for sale to the Thai Tobacco Monopoly, and (3) by small growers who sell their green leaf to Monopoly or privately owned curing stations. Tobacco so produced is grown entirely from imported seed, and the cured leaf is of light colored Virginia type. Small growers who wish to sell to Monopoly or privately owned curing stations must secure seedlings from the Tobacco Station for the district in which they are located. All flue-cured tobacco produced in Thailand is cured in centralized curing stations and the dry leaf is sold exclusively to the Thai Tobacco Monopoly.

A small acreage of flue-cured is planted in August with the green leaf delivered to curing stations in November and December. The main crop of flue-cured is transplanted in late October and early November with deliveries of green leaf for curing beginning about January 1.

## Dark Sun-Cured "Native"

The "native tobaccos" are grown from locally produced seed and all production is by small growers, most of whom process their own leaf. A primitive form of curing is employed. The green leaf is chopped in fine strips, and this shredded material is laid in the sun to dry. The end product is dark and strong and is used principally by the Chinese inhabitants as chewing or pipe tobacco as well as in hand-rolled cigarettes or cheroots which are made by wrapping the shredded tobacco in dried leaves of a special type of banana plant. All native tobaccos are produced under grower licenses issued by the Excise Department. Planting and harvesting dates for the "native" tobaccos vary widely by districts, depending primarily on the local pattern of rainfall.

Average yields are very low, but a considerable portion of the crop is interplanted with other crops. The outturn for the current crop is estimated at 367 pounds per acre for flue-cured and 386 pounds for native sun-cured leaf. Native tobaccos are frequently grown on freshly cleared forest lands.

According to the Thai Tobacco Monopoly, flue-cured tobacco is produced in only 15 provinces, all of these being located in the Northeastern regions of Thailand. Native tobacco is produced in 56 provinces of the Kingdom.

## Increased Production and Consumption of Flue-Cured

Flue-cured production increased from an average of 4.2 million annually in the 1935-39 period to slightly over 22 million in 1953 with about the same level forecast for 1954. Thailand has long imported unmanufactured leaf tobacco, cigarettes and cigars. Most of the imported leaf is flue-cured obtained from the U. S. The Thai Tobacco Monopoly continues programs with strong emphasis on expanding domestic production of flue-cured tobacco. U. S. flue-cured exports will likely face increasing competition as Thailand's domestic production continues to expand. However, the increased consumption of cigarettes may continue to "require" significant quantities of U.S. leaf as a fairly high proportion of U. S. tobaccos is needed in cigarettes produced domestically as it is superior to Thailand flue-cured in regard to flavor, aroma and burning qualities.

Domestic production of cigarettes has increased greatly from 2.98 billion in 1948 to 7.44 billion in 1952. (1953 data not yet available). This upward trend is expected to continue.

Cigarette imports declined from about 2 million annually in the early 1930's to practically none in 1945. Imports rose sharply in the late 1940's with the upward trend continuing through 1952. Although data for 1953 are not yet available, increased tarrif duties were expected to decrease imports.

All tobacco products imported by Thailand are purchased and distributed through the Thai Tobacco Monopoly.

Production of Unmanufactured Leaf Tobacco in Thailand 1/

| Year | Flue-cured | Native | Total |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1954 2/ | 22,050 | 18,055 | 40,105 |
| 1953 | 22,625 | 23,000 | 45,625 |
| 1947-51 | 8,200 | 27,000 | 35,200 |
| 1935-39 | 900 | 25,000 | 25,900 |

1/ Based on crop year which is July 1 through June 30.
2/ Forecast.

Thailand Imports of Unmanufactured Leaf Tobacco

| Year | United States | Total |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| 1953 (11 mos.) | 6,115 | 1/ |
| 1952 | 6,126 | 6,180 |
| 1951 | 6,328 | 1/ |
| 1950 | 4,411 | 1/ |
| 1949 | 2,590 | 2,624 |

1/ Not available.

Thailand Imports of Tobacco Products

| Year | Cigarettes | Cigars | Packaged & bulk cut-tobacco |
|---|---|---|---|
| | 1,000 pieces | number | pounds |
| 1952 | 150,380 | 1/ | 1/ |
| 1950 | 120,000 | 3,000 | 20,000 |
| 1948 | 127,000 | 1/ | 1/ |
| 1940-44 | 85,330 | 250 | 6,150 |
| 1935-39 | 15,170 | 2,000 | 19,500 |

1/ Not available.

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March 5, 1954

# MISCELLANEOUS TOBACCO TRADE DEVELOPMENTS

## New Cigarette Brands in Panama to Sell for 10 and 15 Cents per Pack

Late in January announcement was made that the new Panamanian cigarette factory reported earlier, would go into Production in February. This firm will produce two kinds of cigarettes--one made entirely of local tobacco called "Dos Reales" to retail at ten cents per pack of 20 cigarettes and an American Blended type "Panama" made from domestic and imported tobacco to retail at 15 cents per pack of 20.

Higher duties on imported cigarettes may be in the offing.

## Surplus Low Grade Flue-Cured Leaf in India

Information released by the Andhra State Government indicates that over 30 million pounds of low-grade flue-cured tobacco remains unsold in storage in Guntur District. Most of this is in grades normally exported to European and Asiatic countries. In recent months the prices for these grades have been decreased from a level of about 8 to 10.5 cents per pound to 2 to 2.5 cents per pound and the tobacco still has not moved.

In an effort to move this tobacco the Government of India is considering sending a mission abroad to explore market outlets for low-grade flue-cured leaf.

## Australian Imports of Tobacco from Indonesia

A recently announced trade agreement between Australia and Indonesia covering the period November 1953-October 31, 1954 indicates that "commercial estimates of the likely volume of trade" includes a "target" of Australian imports of leaf tobacco from Indonesia to be valued at $658,000. This will be dark air-cured leaf as Indonesia does not produce enough flue-cured to meet domestic needs. Australian imports from Indonesia have been small varying from 18 to 165 thousand pounds annually in the last three years.

## Australian Imports of U. S. Tobacco in First Half of 1954 to Increase

Australia expects to import about 11.2 million pounds of American leaf tobacco in the first six months of 1954 (flue-cured 11,000,000 pounds, Burley 100,000, fire-cured 90,000, cigar binder 15,000 and Maryland 7,000. Data are not readily available as to purchases by months but such information is available for actual shipments by months. In this connection, of the total exports from the U. S. to Australia in the past 3 years, approximately 30 percent were made in the first six months of these calendar years. In the last few years (including 1950, 1951 and 1952) Australia has been importing 24 to 32 million pounds of unmanufactured tobacco annually. The U. S. is the largest supplier, followed by Southern Rhodesia, Northern Rhodesia, India and Canada. The amount imported from Southern Rhodesia has been increasing substantially.

### Australian Imports of Unmanufactured Tobacco

| Year | Total 1,000 pounds | U. S. 1,000 pounds | British Southeast African Areas 1/ 1,000 pounds | All Other 1,000 pounds |
|---|---|---|---|---|
| 1947 | 21,333 | 19,758 | 1,336 | 239 |
| 1948 | 29,941 | 22,202 | 7,573 | 166 |
| 1949 | 22,190 | 15,944 | 4,796 | 1,450 |
| 1950 | 25,799 | 19,545 | 5,434 | 820 |
| 1951 | 24,728 | 17,113 | 4,906 | 2,709 |
| 1952 | 32,133 | 21,339 | 7,930 | 2,864 |
| 1953 | 2/ | 26,694 | 2/ | 2/ |

1 Including Southern Rhodesia, Northern Rhodesia, Nyasaland and Tanganyika.

2/ Not yet available.

# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
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WASHINGTON, D.C.

MAR 25 1954
U. S. DEPARTMENT OF AGRICULTURE

FT 8-54 March 10, 1954

## TOBACCO FOR HARVEST, FIRST HALF, CALENDAR YEAR 1954

The harvest of leaf tobacco in the first half of calendar year 1954, mostly in the southern hemisphere, is forecast at 2.04 billion pounds, approximately 7.4 percent above 1953 and 14.5 percent above the 1947-51 average.

This forecast includes only the production for harvest in the first half of calendar year 1954. There are several countries in which tobacco is harvested in both 6-month periods of the year. Production in such countries is included in this forecast if the bulk of the crop is harvested in the first half of the year 1/.

The largest increases as compared to 1953 are for Southern Rhodesia, India, Pakistan, Burma, Indochina, Brazil, Colombia, and Paraguay. Practically all of the increase in Africa and Asia in the last few years has been in flue-cured leaf. Much of the increase in Latin America was in flue-cured, but the demand for cigar and cigarillos, coupled with the decreased level of production of cigar type tobacco in Indonesia, has stimulated the output of dark leaf in Central America, South America and the Caribbean areas.

### North America, Including the Caribbean Area

Production in the North American countries for harvest in the first half of 1954 is forecast at 251.1 million pounds. This is about 13 percent above 1953, and almost 14 percent above the average of the 1947-51 period. The largest increases forecast for 1954, as compared to 1953, are for Cuba, Mexico, and Honduras.

### South America

Leaf tobacco to be harvested in South American countries in the first half of 1954 is estimated at 467 million pounds, which is about 6 percent greater than in 1953, and approximately 22 percent above the 1947-51 average.

The forecasts for both flue-cured and cigar types show fairly general increases throughout the area. The output of Brazilian Bahia cigar tobacco is expected to be about 59 million pounds, about 65 percent greater than the drought-stricken outturn of 1953 and slightly above the 1947-51 average. Brazilian flue-cured leaf production which has been expanding rapidly in the States of Rio Grande Do Sul and Santa Catarina is estimated tentatively at about the same level as 1953 although actual output may be substantially higher if weather is favorable.

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1/ Included in this category are Thailand, Ceylon, Indonesia, Pakistan, Colombia and Madagascar.

Total production estimates for the 1954 harvest in Colombia indicates an increase of about 40 percent as compared to 1953. The above estimate includes the total crop to be harvested in 1954 even though a small proportion of the crop is harvested in the second half of the calendar year.

## Africa

Production to be harvested in Africa in the first half of 1954 is tentatively estimated at 229 million pounds or 5.3 percent above the output of 1953 and 22 percent above the 1947-51 annual average. Most of the increase in 1954 as compared to actual production in 1953 is expected in Southern Rhodesia, Northern Rhodesia and Nigeria.

## Asia

Production in Asia in the first half of the calendar year is estimated at almost 1,086 million pounds for 1954 as compared to 1,013 million in 1953 and 986.4 million in the 1947-51 period. As indicated above, Thailand, Indonesia, Ceylon, and Pakistan have tobacco harvested in both 6-month periods of the year.

Most of the increase forecast for 1954 is due to expanded production in India, Pakistan and Burma with probably a slight increase in Indonesia.

## Oceania

The 1954 production of Oceania is estimated at approximately 9.5 million pounds; considerably below the 1953 level. Estimated production for both Australia and New Zealand, practically all of which is flue-cured, is expected to be below 1953.

## FORECAST OF PRODUCTION BY KIND

### Flue-Cured

Output of flue-cured tobacco in the first 6 months of the calendar year continues to rise, particularly in Southern Rhodesia, India, Pakistan, and Indonesia. A total of 417 million pounds is indicated, compared with 374 million pounds in 1953. A considerable portion of the increase forecast for India is attributable to the expectation that yields will be higher than the actual outturn of 1953 when severe drought conditions reduced production in Madras.

Production in Brazil may be above indicated estimates if the weather conditions are sufficiently favorable to allow normal growth and maturity of a considerable portion of the crop which was replanted after the first planting was destroyed by floods.

### Burley

Production of Burley to be harvested in the first half of 1954 is forecast at about 13.9 million pounds. This is approximately 5 percent below the 1953 level, but over 65 percent above the 1947-51 average.

## Other Light Air-Cured

Other light air-cured tobacco includes all light air-cured except Burley. Production for harvest in the first half of 1954 is estimated at 74.4 million pounds. This is about 45 percent above the 1947-51 average but below the 1953 level.

Production declines are forecast for all of the major producing countries of this kind of leaf, especially Brazil, Argentina, Madagascar and the Union of South Africa.

## Light Sun-Cured

Production for harvest in the first half of 1954 is estimated at 73 million pounds or slightly above the 1953 level. The forecast is about double the output for the 1935-39 period but 6 percent below the 1947-51 average.

Increases for 1954 as compared to 1953 are indicated for Mexico, Paraguay and Costa Rica while the forecast for India is well below the 1953 level. The decline in India reflects an increase in flue-cured leaf which sells at a premium compared with light sun-cured. In India some of the kind of leaf which is normally flue-cured is actually sun-cured when flue-curing facilities are inadequate. The amount of light sun-cured leaf produced in India has steadily declined reflecting the increasing number of barns equipped for flue-curing.

## Dark Air-Cured

The expected output of 1,252 million pounds for harvest in the first half of 1954 is 8 million or slightly over one-half percent above the 1953 as well as the 1947-51 average levels. This is about 4 percent below the 1935-39 level.

Important increases as compared to 1953 are indicated for Brazil (Bahia cigar), Colombia, Honduras, Dominican Republic, Union of South Africa and Nigeria.

## Dark Sun-Cured

Output forecast for the first half of 1954 is 181 million pounds or about 10 percent above 1953 as well as the 1947-51 average. Increases are forecast for practically all producing countries except Thailand, but the bulk of the increase is expected in Cuba, Paraguay and India.

## Fire-Cured

The forecast of 29.5 million pounds of fire-cured tobacco for harvest in the first half of 1954 is slightly below the 1953 level as well as the 1947-51 average. Nyasaland accounts for the bulk of fire-cured harvested in the first half of the calendar year and the big increase (for harvest in first half of the calendar year) since 1935-39 is chiefly due to expanded production in this area.

Table 1.--Leaf Tobacco: Estimated production by kind harvested in the first half of calendar year 1954, with comparisons--farm sales weight 1/

| Kinds | 1935-39 | 1947-51 | 1953 | 2/ 1954 |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-cured | 84,864 | 279,303 | 374,443 | 417,301 |
| Burley | 409 | 8,028 | 14,658 | 13,881 |
| Other light air-cured | 37,550 | 57,139 | 100,118 | 74,411 |
| Light sun-cured | 35,184 | 77,320 | 71,830 | 73,042 |
| Dark air-cured | 3/ 1,722,265 | 3/ 1,152,881 | 3/ 1,144,646 | 1,252,292 |
| Dark sun-cured | 176,206 | 166,838 | 162,966 | 181,122 |
| Fire-cured | 19,661 | 30,982 | 30,039 | 29,455 |
| Oriental (Turkish) | 1,455 | 2,746 | 1,180 | 1,280 |
| Total | 2,077,594 | 1,775,237 | 1,899,880 | 2,042,784 |

1/ Farm sales weight is about ten percent above the dry weight normally reported in manufacturing and export statistics.

2/ Preliminary.

3/ Does not include Haiti and Jamaica.

## Oriental (Turkish) and Semi-Oriental

The output of oriental at 1.28 million is slightly above that of 1953 but well below averages for both the 1935-39 and 1947-51 periods.

Practically all of the oriental harvest in the first 6 months of the year is grown in the southeastern part of Africa. The decline in this area in recent years is largely due to smaller production in Southern Rhodesia.

LEAF TOBACCO: Estimated acreage, yield and production of specified countries harvested in the first half of calendar year 1954, with comparison - farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Average | | | | Average | | | | Average | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Costa Rica | - | 3 | 3 | 3 | - | 800 | 700 | 700 | - | 2,281 | 2,000 | 2,110 |
| El Salvador | 1 | 3 | 3 | 3 | 700 | 467 | 392 | 335 | 3/ 750 | 1,113 | 1,514 | 870 |
| Guatemala | 5 | 7 | 7 | 7 | 376 | 590 | 599 | 510 | 1,892 | 3,920 | 4,255 | 3,449 |
| Honduras | 7 | 11 | 14 | 21 | 606 | 684 | 517 | 575 | 3/ 4,500 | 7,915 | 7,250 | 12,175 |
| Mexico | 51 | 90 | 79 | 79 | 750 | 882 | 1,120 | 1,160 | 38,200 | 79,425 | 88,438 | 92,230 |
| Nicaragua | 1 | 2 | 2 | 3 | 900 | 775 | 900 | 950 | 800 | 1,150 | 1,330 | 2,850 |
| Panama (including Canal Zone) | 4/ | 2 | 2 | 2 | 4/ | 450 | 450 | 450 | 4/ | 720 | 720 | 720 |
| CARIBBEAN: | | | | | | | | | | | | |
| Cuba | 108 | 132 | 136 | 168 | 429 | 550 | 580 | 580 | 48,092 | 72,529 | 80,500 | 97,285 |
| Dominican Republic | 25 | 44 | 45 | 36 | 985 | 965 | 711 | 970 | 24,625 | 42,000 | 32,000 | 35,300 |
| Haiti | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 3,350 |
| Jamaica | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 775 |
| Total for Countries Shown | 198 | 294 | 291 | 322 | - | - | - | - | 118,859 | 211,053 | 218,007 | 251,114 |
| ASIA MAJOR: | | | | | | | | | | | | |
| Burma | 108 | 129 | 137 | 137 | 726 | 690 | 746 | 815 | 78,400 | 88,800 | 103,000 | 112,000 |
| Ceylon | 3/ 14 | 3/ 10 | 14 | 13 | 3/ 615 | 573 | 507 | 536 | 9,000 | 3/ 5,730 | 7,100 | 6,700 |
| Pakistan | 5/ 355 | 172 | 174 | 190 | 5/ 913 | 910 | 947 | 940 | 5/ 324,053 | 156,511 | 164,771 | 180,000 |
| India | 5/ 917 | 812 | 798 | 810 | 5/ 830 | 674 | 615 | 650 | 5/ 761,000 | 547,150 | 490,560 | 526,650 |
| Indochina | 3/ 44 | 3/ 25 | 30 | 4/ | 3/ 728 | 3/ 600 | 667 | 4/ | 3/ 32,004 | 3/ 15,000 | 20,000 | 33,100 |
| Indonesia | 449 | 3/ 178 | 350 | 350 | 532 | 350 | 300 | 314 | 3/ 238,775 | 3/ 62,230 | 106,105 | 110,000 |
| Philippine Islands | 176 | 111 | 89 | 90 | 474 | 552 | 602 | 608 | 82,292 | 62,066 | 54,005 | 54,700 |
| Taiwan (Formosa) | 4 | - | 14 | 14 | 1,490 | - | 1,569 | 1,606 | 5,961 | 13,740 | 21,967 | 22,487 |
| Thailand | 3/ 53 | 83 | 108 | 107 | 3/ 489 | 424 | 422 | 375 | 3/ 25,900 | 35,200 | 45,625 | 40,102 |
| Total for Countries Shown | 2,120 | 1,520 | 1,714 | 1,711 | - | - | - | - | 1,557,385 | 986,427 | 1,013,133 | 1,085,739 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 29 | 67 | 92 | 90 | 965 | 926 | 881 | 875 | 27,983 | 61,140 | 81,129 | 78,314 |
| Bolivia | 3 | 3 | 3 | 3 | - | - | - | 700 | 2,500 | 2,100 | 2,100 | 2,126 |
| Brazil | 250 | 337 | 382 | 400 | 811 | 692 | 677 | 677 | 202,703 | 233,120 | 267,347 | 271,160 |
| Chile | 9 | 9 | 7 | 8 | 1,846 | 1,670 | 1,743 | 1,707 | 16,618 | 14,719 | 11,951 | 13,161 |
| Colombia | 3/ 37 | 47 | 50 | 69 | 3/ 803 | 958 | 980 | 1,005 | 3/ 31,697 | 45,027 | 48,500 | 69,666 |
| Paraguay | 22 | 16 | 17 | 20 | 808 | 1,150 | 908 | 1,025 | 17,792 | 18,438 | 15,701 | 20,723 |
| Uruguay | 1 | 1 | 1 | 1 | 860 | 967 | 980 | 900 | 1,254 | 957 | 700 | 827 |
| Venezuela | 10 | 8 | 16 | 11 | 825 | 626 | 844 | 983 | 7,700 | 6,224 | 13,133 | 10,814 |
| Total for Countries Shown | 361 | 488 | 568 | 602 | - | - | - | - | 308,247 | 381,725 | 440,561 | 467,291 |
| AFRICA: | | | | | | | | | | | | |
| Kenya | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 1,540 | 1,190 | 1,200 |
| Nyasaland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 15,752 | 28,626 | 32,790 | 32,000 |
| Tanganyika | 3 | 4/ | 4/ | 4/ | 345 | 4/ | 4/ | 4/ | 920 | 4,588 | 3,980 | 4,000 |
| Uganda | 4 | 4/ | 4/ | 4/ | 375 | 4/ | 4/ | 4/ | 1,500 | 4,080 | 5,815 | 3,600 |
| Madagascar | 19 | 12 | 20 | 17 | 764 | 642 | 489 | 550 | 14,164 | 7,190 | 9,722 | 9,259 |
| Mauritius | 6/ | 1 | 1 | 1 | 1,200 | 1,215 | 1,600 | 800 | 650 | 850 | 1,391 | 871 |
| Mozambique | 3/ 1 | 4 | 4 | 4 | 3/ 385 | 400 | 400 | 400 | 3/ 467 | 1,535 | 1,500 | 1,500 |
| Nigeria | 1 | 2 | 5 | 10 | 500 | 500 | 600 | 600 | 300 | 800 | 3,530 | 6,100 |
| Northern Rhodesia | 4 | 15 | 20 | 24 | 486 | 410 | 465 | 500 | 1,585 | 6,130 | 10,493 | 12,150 |
| Southern Rhodesia | 50 | 136 | 180 | 197 | 504 | 626 | 560 | 610 | 26,150 | 84,698 | 105,500 | 120,450 |
| Union of South Africa | 47 | 93 | 86 | 76 | 523 | 510 | 505 | 500 | 24,972 | 47,421 | 40,648 | 37,860 |
| Total for Countries Shown | 129 | 406 | 509 | 511 | - | - | - | - | 86,460 | 187,458 | 216,559 | 228,990 |
| OCEANIA: | | | | | | | | | | | | |
| Australia | 10 | 5 | 8 | 7 | 532 | 789 | 770 | 775 | 5,276 | 3,649 | 5,870 | 5,300 |
| New Zealand | 2 | 4 | 4 | 3 | 787 | 1,265 | 1,642 | 1,296 | 1,367 | 4,925 | 5,750 | 4,150 |
| Total for Countries Shown | 12 | 9 | 12 | 10 | - | - | - | - | 6,643 | 8,574 | 11,620 | 9,450 |
| Total for All Countries Shown | 2,820 | 2,717 | 3,094 | 3,156 | - | - | - | - | 2,077,594 | 1,775,237 | 1,899,880 | 2,042,584 |

1/ Farm sales weight is about 10 percent above the average dry weight normally reported in manufacturing and export trade statistics. 2/ Preliminary. 3/ Less than a 5 year average.
4/ Not available. 5/ Recently methods of estimating acreage and production have changed in an effort to improve data, therefore data for 1935-39 are not comparable with later information
6/ Less than 500 acres.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

FLUE-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954, with comparison -- farm sales weight 1/

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Costa Rica | - | 3/ | 3/ | 3/ | - | 344 | 300 | 300 | - | 44 | 143 | 205 |
| El Salvador | 3/ | 2 | 2 | 2 | - | 345 | 388 | 316 | 50 | 700 | 1,086 | 750 |
| Guatemala | 3/ | 1 | 1 | 2/ | - | 580 | 770 | 725 | 132 | 390 | 431 | 254 |
| Honduras | 3/ | 3/ | 1 | 1 | - | 405 | 345 | 345 | - | 120 | 250 | 175 |
| Jamaica | - | - | - | - | - | - | - | - | - | - | - | 75 |
| Mexico | 1 | 4 | 5 | 5 | 720 | 850 | 786 | 862 | 700 | 3,579 | 4,279 | 4,814 |
| Nicaragua | - | 1 | 1 | 1 | - | 900 | 900 | 1,000 | - | 700 | 600 | 1,100 |
| ASIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Burma | - | 3/ | 1 | 1 | - | 700 | 715 | 800 | - | 88 | 784 | 1,120 |
| Ceylon | - | 1 | 5 | 5 | - | 475 | 400 | 500 | - | 950 | 2,000 | 2,500 |
| India | 61 | 120 | 150 | 190 | 440 | 532 | 455 | 525 | 26,900 | 64,510 | 68,000 | 90,000 |
| Indochina | - | 3/ | - | 1 | - | - | - | 550 | - | 450 | 550 | 600 |
| Indonesia | - | 14 | 23 | 31 | - | - | 423 | 415 | - | 350 | 9,920 | 13,000 |
| Pakistan | - | 3 | 4 | - | - | 696 | 1,000 | - | - | 1,865 | 4,000 | 9,000 |
| Philippine Republic | 1 | 2 | 5 | 4/ | 550 | 647 | 481 | 4/ | 342 | 1,320 | 2,425 | 4,000 |
| Taiwan | 3 | 14 | 14 | 14 | 1,200 | 944 | 1,361 | - | 3,751 | 13,220 | 21,967 | 22,487 |
| Thailand | 3 | 29 | 62 | 60 | 280 | 300 | 368 | 367 | 900 | 8,200 | 22,625 | 22,046 |
| SOUTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Argentina | 1 | 9 | 12 | 4/ | 1,000 | 887 | 974 | 4/ | 599 | 7,983 | 14,790 | 15,432 |
| Brazil | 10 | 35 | 45 | 46 | 1,200 | 1,299 | 1,432 | 1,230 | 12,549 | 45,498 | 58,697 | 59,000 |
| Chile | 3/ | 3/ | 1 | 1 | - | 1,464 | 929 | 1,346 | 203 | 478 | 520 | 705 |
| Venezuela | - | 3 | 7 | 6 | - | 881 | 892 | 1,157 | - | 2,724 | 6,363 | 6,907 |
| AFRICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Nyasaland | 4/ | 5 | 7 | 6 | 4/ | 539 | 521 | 500 | 2,217 | 2,696 | 3,650 | 3,000 |
| Mauritius | 3/ | 1 | 4/ | 4/ | - | 600 | 4/ | 4/ | 430 | 623 | 941 | 573 |
| Mozambique | - | 3 | 3 | 4/ | - | 383 | 400 | - | - | 1,150 | 1,200 | 1,300 |
| Nigeria | - | 3/ | 1 | 1 | - | - | 500 | 500 | - | 200 | 530 | 500 |
| Northern Rhodesia | 4 | 13 | 20 | 20 | 450 | 425 | 472 | 600 | 1,500 | 5,415 | 10,323 | 12,000 |
| Southern Rhodesia | 46 | 130 | 179 | 170 | 509 | 633 | 603 | 700 | 24,623 | 82,321 | 105,100 | 120,000 |
| Tanganyika | 4/ | 4 | 4/ | 4/ | 4/ | 515 | 4/ | 4/ | 10 | 2,060 | 2,291 | 2,300 |
| Union of South Africa |  |  |  |  |  |  |  |  |  |  |  |  |
| Amorello | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 2,715 | 19,335 | 2,313 | - |
| Orinoco | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 600 | 2,500 | 14,470 | 12,408 |
| Kenya | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 1,200 | 1,000 | 1,000 |
| Uganda | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 160 | 1,725 | 600 |
| OCEANIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Australia | 10 | 5 | 8 | 8 | 532 | 789 | 770 | 660 | 5,276 | 3,649 | 5,870 | 5,300 |
| New Zealand | 2 | 4 | 4 | 4 | 685 | 1,200 | 1,258 | 1,296 | 1,367 | 4,825 | 5,600 | 4,150 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 84,864 | 279,303 | 374,443 | 417,301 |

See footnotes at end of circular.

BURLEY TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954 with comparison -- farm sales weight 1/

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Costa Rica | - | 3/ | 3/ | 3/ | - | - | - | - | - | 1 | 2 | 5 |
| El Salvador | - | - | - | 3/ | - | - | - | - | - | - | - | 20 |
| Guatemala | - | 3/ | 3/ | 3/ | - | 721 | 718 | 760 | - | 120 | 172 | 152 |
| Mexico | 3/ | 1 | 1 | 1 | - | 1,340 | 1,300 | 1,338 | 300 | 1,700 | 1,742 | 2,016 |
| Nicaragua | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 50 | 130 | 150 |
| ASIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| India | - | 3 | 3 | 3 | - | 500 | 500 | 500 | - | 1,640 | 1,650 | 1,650 |
| SOUTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Argentina | 3/ | 1 | 1 | 1 | 638 | 500 | 615 | 615 | 99 | 496 | 661 | 661 |
| Brazil | - | 1 | 4 | 4 | - | 1,200 | 1,200 | 1,125 | - | 1,000 | 4,300 | 4,500 |
| Chile | - | 3/ | 3/ | 3/ | - | 1,650 | 1,802 | 1,917 | - | 171 | 247 | 265 |
| Venezuela | - | 2 | 5 | 3 | - | 873 | 742 | 1,050 | - | 1,550 | 3,684 | 2,562 |
| AFRICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Nyasaland | - | 2 | 3 | 3 | - | 475 | 600 | 600 | - | 950 | 1,800 | 1,800 |
| Northern Rhodesia | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 10 | 250 | 120 | 100 |
| OCEANIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| New Zealand | - | 3/ | 3/ | - | - | - | - | - | - | 100 | 150 | - |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 409 | 8,028 | 14,658 | 13,881 |

See footnotes at end of circular.

OTHER LIGHT AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954 with comparison -- farm sales weight 1/

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| **SOUTH AMERICA:** |  |  |  |  |  |  |  |  |  |  |  |  |
| Argentina |  |  |  |  |  |  |  |  |  |  |  |  |
| Maryland | 1 | 1 | 1 | 4/ | 800 | 500 | 615 | 4/ | 596 | 489 | 661 | 772 |
| Native | 3 | 5 | 10 | 4/ | 1,220 | 1,022 | 1,230 | 4/ | 4,388 | 6,109 | 14,330 | 11,023 |
| Brazil | 12 | 30 | 41 | 41 | 1,150 | 1,100 | 1,263 | 1,250 | 13,800 | 33,000 | 69,445 | 50,300 |
| AFRICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Madagascar |  |  |  |  |  |  |  |  |  |  |  |  |
| Maryland | 17 | 11 | 19 | 4/ | 750 | 567 | 460 | 4/ | 12,764 | 6,240 | 8,722 | 8,377 |
| Mauritius |  |  |  |  |  |  |  |  |  |  |  |  |
| Amarello | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 220 | 227 | 450 | 298 |
| Northern Rhodesia | 4/ | 4 | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 60 | 74 | 20 | 20 |
| Union of South Africa | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 5,722 | 11,000 | 6,490 | 3,621 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 37,550 | 57,139 | 100,118 | 74,411 |

See footnotes at end of circular.

LIGHT SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954, with comparison—farm sales weight 1/

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Costa Rica | - | 3 | 3 | 2 | - | 806 | 800 | 800 | - | 2,236 | 1,855 | 1,900 |
| Mexico | 13 | 37 | 33 | 33 | 921 | 1,098 | 1,158 | 1,170 | 12,200 | 40,046 | 45,200 | 45,600 |
| ASIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| India |  |  |  |  |  |  |  |  |  |  |  |  |
| Virginia light varieties | 20 | 40 | 30 | 4/ | 440 | 525 | 445 | 4/ | 9,640 | 21,000 | 13,000 | 10,000 |
| SOUTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Paraguay |  |  |  |  |  |  |  |  |  |  |  |  |
| Floja | 16 | 13 | 13 | 4/ | 834 | 900 | 905 | 4/ | 13,344 | 14,038 | 11,775 | 15,542 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 35,184 | 77,320 | 71,830 | 73,042 |

DARK SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954, with comparison—farm sales weight 1/

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Cuba |  |  |  |  |  |  |  |  |  |  |  |  |
| Filler & binder |  |  |  |  |  |  |  |  |  |  |  |  |
| Vuelta Abajo | 42 | 51 | 54 | 65 | 468 | 603 | 685 | 685 | 5/ 19,669 | 5/ 30,630 | 5/ 39,400 | 44,414 |
| Filler (semi-Vuelta) | 6 | 8 | 8 | 10 | 365 | 418 | 542 | 500 | 2,188 | 3,589 | 4,400 | 5,382 |
| Filler (Remedios) | 56 | 67 | 68 | 80 | 413 | 501 | 474 | 475 | 23,106 | 33,869 | 31,000 | 37,848 |
| Cigarette & chewing (Oriente) | 2 | 3 | 3 | 5 | 883 | 710 | 750 | 750 | 1,765 | 2,161 | 2,900 | 3,556 |
| Dark shade grown: |  |  |  |  |  |  |  |  |  |  |  |  |
| Partido & Vuelta Abajo | 2 | 3 | 3 | 8 | 680 | 710 | 750 | 750 | 6/ 1,364 | 6/ 2,280 | 6/ 2,800 | 6,085 |
| ASIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| India |  |  |  |  |  |  |  |  |  |  |  |  |
| Natu | 170 | 127 | 112 | 4/ | 560 | 460 | 456 | 4/ | 95,200 | 58,000 | 50,000 | 55,000 |
| Taiwan (Formosa) | 1 | 4/ | 4/ | 4/ | 2,000 | 4/ | 4/ | 4/ | 2,210 | 520 | 4/ | 4/ |
| Thailand | 50 | 54 | 46 | 47 | 500 | 500 | 486 | 384 | 25,000 | 27,000 | 23,000 | 18,056 |
| SOUTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Paraguay |  |  |  |  |  |  |  |  |  |  |  |  |
| Fuerte | 6 | 3 | 4 | 4/ | 741 | 1,100 | 981 | 4/ | 4,448 | 4,400 | 3,926 | 5,181 |
| AFRICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Nyasaland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 789 | 4,004 | 5,240 | 5,200 |
| Mozambique | 1 | 1 | 1 | 1 | - | - | - | - | 467 | 385 | 300 | 400 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 176,206 | 166,838 | 162,966 | 181,122 |

See footnotes at end of circular.

DARK AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954 with comparison—farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| El Salvador | | | | | | | | | | | | |
| Cigar (including shade grown) | 1 | 1 | 1 | 1 | 650 | 625 | 655 | 512 | 700 | 413 | 428 | 100 |
| Guatemala | 5 | 6 | 6 | 6 | 382 | 579 | 580 | 490 | 1,760 | 3,410 | 3,652 | 3,043 |
| Honduras | | | | | | | | | | | | |
| Copan | 7 | 11 | 13 | 20 | 606 | 686 | 518 | 600 | 4,500 | 7,795 | 7,000 | 12,000 |
| Mexico | 37 | 48 | 40 | 40 | 667 | 700 | 636 | 680 | 25,000 | 34,100 | 37,217 | 39,800 |
| Nicaragua | | | | | | | | | | | | |
| Chicalgrs | 1 | 1 | 1 | 2 | 800 | 415 | 600 | 750 | 800 | 400 | 600 | 1,500 |
| Shade grown | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 100 |
| Panama | 4/ | 2 | 2 | 2 | 4/ | 450 | 450 | 450 | 4/ | 720 | 720 | 720 |
| Dominican Republic | | | | | | | | | | | | |
| Criollo & Orlor | 25 | 44 | 45 | 36 | 985 | 965 | 711 | 970 | 24,625 | 42,000 | 32,000 | 35,300 |
| Jamaica | | | | | | | | | | | | |
| Binder filler | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 700 |
| Haiti | | | | | | | | | | | | |
| Kentucky native | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 3,350 |
| ASIA: | | | | | | | | | | | | |
| Burma | 108 | 129 | 136 | 136 | 726 | 689 | 752 | 815 | 78,400 | 88,712 | 102,216 | 110,880 |
| Ceylon (including cigar) | 10 | 6 | 7 | 6 | 580 | 560 | 500 | 500 | 6,200 | 3,420 | 3,500 | 3,000 |
| India | 666 | 522 | 503 | 4/ | 960 | 770 | 712 | 4/ | 629,260 | 402,000 | 357,910 | 370,000 |
| Indochina | 44 | 25 | 29 | 4/ | 727 | 580 | 670 | 4/ | 32,004 | 14,550 | 19,450 | 32,500 |
| Pakistan | 355 | 169 | 170 | 172 | 915 | 1,005 | 1,005 | 994 | 324,053 | 154,646 | 160,771 | 171,000 |
| Indonesia | 449 | 164 | 327 | 4/ | 530 | 377 | 295 | 4/ | 238,775 | 61,880 | 96,185 | 97,000 |
| Philippine Republic | | | | | | | | | | | | |
| Native | 175 | 109 | 84 | 82 | 466 | 545 | 608 | 618 | 81,950 | 60,746 | 51,580 | 50,700 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | | | | | | | | | | | | |
| Native | 20 | 42 | 56 | 4/ | 914 | 917 | 894 | 4/ | 18,187 | 37,049 | 44,735 | 44,092 |
| Bahia & other cigar | 2 | 6 | 8 | 4/ | 779 | 690 | 692 | 4/ | 1,845 | 4,141 | 4,189 | 3,748 |
| Cuerda | 1 | 1 | 1 | 1 | - | - | - | - | 1,200 | 2,400 | 881 | 881 |
| Bolivia | 3 | 3 | 3 | 3 | 700 | 700 | 700 | 700 | 2,500 | 2,100 | 2,100 | 2,126 |
| Brazil | | | | | | | | | | | | |
| Bahia | 90 | 85 | 74 | 84 | 850 | 588 | 527 | 702 | 76,600 | 56,000 | 36,900 | 59,000 |
| Other cigar | 4 | 4 | 4 | 4 | 850 | 590 | 530 | 600 | 3,400 | 2,350 | 2,100 | 2,500 |
| Twist | 134 | 182 | 214 | 221 | 741 | 523 | 425 | 434 | 96,354 | 95,272 | 95,905 | 95,860 |
| Chile | | | | | | | | | | | | |
| Paraguay | 7 | 6 | 4 | 5 | 1,850 | 1,773 | 1,773 | 1,696 | 12,024 | 11,171 | 6,854 | 8,267 |
| Other cigar | 2 | 2 | 2 | 2 | 1,845 | 1,856 | 1,856 | 1,805 | 4,391 | 2,899 | 4,330 | 3,924 |
| Colombia | | | | | | | | | | | | |
| Cigar binder & wrapper (Cubita) | ) | ) | ) | ) | - | - | - | - | 3,697 | 5,400 | 5,700 | 7,937 |
| Cigar (Garcia) | ) | ) | ) | ) | - | - | - | - | 18,000 | 23,800 | 23,800 | 40,344 |
| Cigar native | 37) | 47) | 50) | 69) | - | - | - | - | 10,000 | 15,827 | 19,000 | 21,385 |
| Uruguay | 1 | 1 | 1 | 1 | 860 | 967 | 980 | 827 | 1,254 | 957 | 700 | 827 |
| Venezuela | 4/ | 3 | 4 | 2 | 4/ | 604 | 892 | 572 | 7,700 | 1,950 | 3,086 | 1,345 |
| AFRICA: | | | | | | | | | | | | |
| Tanganyika | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 20 | 507 | 372 | 400 |
| Madagascar | | | | | | | | | | | | |
| Corse | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 1,400 | 950 | 1,000 | 882 |
| Nigeria | 1 | 2 | 4/ | 4/ | 300 | 300 | 4/ | 4/ | 300 | 600 | 3,000 | 5,600 |
| Union of South Africa | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 15,160 | 13,676 | 16,375 | 20,781 |
| Kenya | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 340 | 190 | 200 |
| Uganda | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 206 | 700 | 200 | 500 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 1,722,265 | 1,152,881 | 1,144,646 | 1,252,292 |

See footnotes at end of circular.

FIRE-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954 with comparison—farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| ASIA: | | | | | | | | | | | | |
| Ceylon (chewing, cheroot & snuff) | 4 | 3 | 2 | 2 | 700 | 680 | 800 | 800 | 2,800 | 1,360 | 1,600 | 1,200 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina Kentucky | 1 | 3 | 3 | 4/ | 880 | 824 | 900 | 4/ | 1,069 | 2,473 | 882 | 2,205 |
| AFRICA: | | | | | | | | | | | | |
| Nyasaland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 12,746 | 20,976 | 22,100 | 22,000 |
| Tanganyika | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 890 | 2,021 | 1,317 | 1,300 |
| Southern Rhodesia | 2 | 2 | 1 | 4/ | 475 | 595 | 530 | 4/ | 862 | 932 | 250 | 250 |
| Uganda | 3 | 4/ | 4/ | 4/ | 450 | 4/ | 4/ | 4/ | 1,294 | 3,220 | 3,890 | 2,500 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 19,661 | 30,982 | 30,039 | 29,455 |

**See footnotes at end of circular.**

ORIENTAL (TURKISH) TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of 1954 with comparison--farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| AFRICA: | | | | | | | | | | | | |
| Northern Rhodesia | 4/ | 1 | 4/ | 4/ | 4/ | 400 | 4/ | 4/ | 15 | 391 | 30 | 30 |
| Southern Rhodesia | 2 | 3/ | 3/ | 3/ | 353 | 386 | 350 | 4/ | 665 | 1,445 | 150 | 200 |
| Union of South Africa | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 775 | 910 | 1,000 | 1,050 |
| TOTAL COUNTRIES SHOWN | - | - | - | - | - | - | - | - | 1,455 | 2,746 | 1,180 | 1,280 |

1/ Farm sales weight is about 10 percent above the average dry weight which is normally reported in export trade statistics. 2/ Preliminary. 3/ Less than 500 acres. 4/ Not available. 5/ Includes some shade grown, which is fire-cured, produced in Vuelta Abajo. 6/ Does not include shade grown wrapper grown in Vuelta Abajo.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

MAR 25 1954
U. S. DEPARTMENT OF AGRICULTURE

FT 9-54

March 17, 1954

# JAPAN--TOBACCO PRODUCTION AND TRADE [1]

## Summary:

Production of leaf tobacco continues to increase rapidly with the 1954 program calling for a total output of about 272 million pounds with a new high of over 160 million pounds of flue-cured. The output and consumption of cigarettes continues sharply upward while the use of pipe tobacco declines. The shift to a higher proportion of flue-cured tobacco in cigarette blends is likely to continue, at least for several years. Imports of unmanufactured leaf from the U. S. totaled 1.2 million pounds in 1951 and rose to 8.1 million in 1952 and 9.5 million in 1953, and flue-cured leaf is much in demand for mixing with domestic tobaccos. However, difficulties relative to availability of dollar exchange are likely to become more acute thus increasing the obstacles encountered in connection with the importation of U. S. tobacco.

## Japan Monopoly Corporation Control of Tobacco Production and Trade

The cultivation, importation, manufacture and distribution of tobacco and tobacco products is closely controlled by a public corporate body, "Japan Monopoly Corporation."

Persons are designated by the Monopoly as eligible tobacco growers and the tobacco growers associations are to a certain extent controlled by and receive funds for operating purposes from the Corporation. Farms on which tobacco is to be cultivated are selected on the basis of soil type, accessibility to the Corporation's leaf purchasing stations, and skill of the farmer in applying recommended techniques. All tobacco harvested is purchased by the Corporation, graded by graders appointed by the Corporation and paid for by grade and quality on the basis of average parity prices established by the Government as for other agricultural products in accordance with existing agricultural parity provisions. Manufactured products are distributed directly by the Monopoly to the retailer through Government Tobacco Selling Offices.

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[1] Based largely on reports from Mr. Wolf Ladejinsky, U. S. Agricultural Attache in Japan, and other information from Foreign Agricultural Service files. Mr. George Thomas who is currently on a trip which includes numerous countries in the Far East will soon return with information as to outlook for tobacco exports in this area in the months ahead.

## Description of Kinds of Leaf Produced

Flue-cured and Burley tobacco are grown from seed originally imported from the United States. However, the flue-cured produced in Japan is considerably heavier bodied that U. S. flue-cured. The plant is topped at an earlier stage in the plant's development than is the case with flue-cured in the U. S. This, of course, increases the thickness and weight of leaves. Japanese flue-cured has less gum than does that grown in the United States. Burley is rather similar to that produced in the U. S. and is used largely in cigarette mixtures.

The native tobacco is dark and thin, being very similar in appearance to Chinese native tobacco. It is used as pipe tobacco, in cigarettes made practically wholly from native leaf, and as cigarette filler in blended cigarettes.

## Greatly Expanded Production of Flue-Cured Leaf

Production of leaf has increased greatly since the mid-1930's and especially with the recovery of Japan after World War II. New all-time highes were established for flue-cured output in each successive year for 1951, 1952 and 1953, with the forecast for 1954 indicating a further large increase. The acreage of native leaf declined steadily during the 1930's and until after World War II, while the area devoted to flue-cured increased from about 10,550 acres in 1930 to 58,545 acres in 1940. The acreage of native and flue-cured remained fairly stable during the 1940-43 period, while the area devoted to Burley rose significantly. With the exception of 1947-48, the production of Burley has steadily declined since World War II. Since 1948 the production of flue-cured has increased rapidly while the output of native leaf has remained fairly stable.

Table 1 -- Area Planted to Tobacco, by Kind - Japan

| Kind | 1935 - 39<br>1,000 acres | 1947 - 51<br>1,000 acres | 1952<br>1,000 acres | 1953<br>1,000 acres | 1954 Program<br>1,000 acres |
|---|---|---|---|---|---|
| Native | 44 | 66 | 55 | 60 | 61 |
| Flue-cured | 46 | 58 | 79 | 98 | 110 |
| Burley | 2 | 5 | 2 | 2 | 2 |
| Total | 92 | 129 | 136 | 160 | 173 |

Source: Japan Monopoly Corporation

## Table 2 -- Production of Leaf Tobacco by Kind 1935-54

| Period | Flue-cured | Native | Burley | Total |
|---|---|---|---|---|
| | million pounds | million pounds | million pounds | million pounds |
| 1935-39 | 74.3 | 71.4 | 3.0 | 148.7 |
| 1940-44 | 80.8 | 84.7 | 15.6 | 181.1 |
| 1945 | 29.9 | 44.9 | 4.7 | 79.5 |
| 1946 | 15.2 | 41.7 | 4.9 | 61.8 |
| 1947 | 31.5 | 90.2 | 11.1 | 132.8 |
| 1948 | 65.0 | 131.9 | 18.1 | 215.0 |
| 1949 | 67.6 | 110.5 | 8.9 | 186.0 |
| 1950 | 91.7 | 108.6 | 3.5 | 203.8 |
| 1951 | 108.7 | 101.3 | 3.3 | 213.3 |
| 1952 | 110.2 | 96.4 | 4.0 | 210.6 |
| 1953 | 129.9 | 100.2 | 4.2 | 234.3 |
| 1954 1/ | 163.7 | 104.2 | 4.0 | 271.9 |

Source: Japan Monopoly Corporation

1/ Forecast: Based on acreage programmed by the Japan Monopoly Corporation

## Domestic Production of Unmanufactured Leaf in 1953

Tobacco production in Japan in 1953 reached an all-time high of 234 million pounds, 7 percent more than the previous high (1948) and 11 percent more than in 1952. The output of flue-cured tobacco at almost 130 million pounds in 1953 established a new record high while the production of native was 100 million pounds; the latter being about the same as the average annual output since 1949. The 1953 output of Burley at 4.2 million pounds was somewhat higher than production in 1950 and 1951 but well below annual output in the 1940-49 period.

The total area planted to tobacco (159,780 acres) as well as the area planted to flue-cured (98,320 acres) in 1953 were new record highs. Cultivation of flue-cured has expanded rapidly since World War II in order to meet both the increased demand for cigarettes as well as to improve the quality of cigarettes produced. The record production in 1953 was achieved by increasing the area planted as yields of both flue-cured and native were slightly lower than in 1952. About 10 percent of the area planted to flue-cured in 1953 was damaged by the heavy rains in June and July of that year. Yields of native tobacco in the major growing area in central Japan were reduced by the cool wet weather which prevailed just before the harvest and during the curing season.

Tobacco cultivation is relatively profitable and farmers are usually eager to be designated by the Corporation. The average price received by farmers for flue-cured leaf was about 85 cents per pound in 1952 and while detailed data for 1953 are not available by type and grade the average price received for all tobacco was about 7 percent higher than in 1952 (table 3). The recent prices paid to farmers appear sufficient to stimulate production to the levels programmed, at least for the next few years.

Table 3 -- Official Average Prices Paid to Japanese Farmers

| Kind | U. S. Cents Per Pound 1/ | | |
|---|---|---|---|
| | 1950 | 1951 | 1952 |
| Native | 15.8 | 22.1 | 57.0 |
| Flue-cured | 23.4 | 32.3 | 85.0 |
| Burley | 11.9 | 16.6 | 41.0 |

1/ Converted to U. S. currency on the basis of 360 yen equal to one U.S. dollar.

## Leaf Production Forecast for 1954

Cigarette consumption in Japan is increasing, and to meet these needs the Monopoly Corporation plans to increase the total plantings in 1954 to 172,860 acres, which authorities expect to produce 272 million pounds of leaf. The area to be planted to flue-cured will be raised sharply to 110,230 acres, while native and Burley will remain about the same as in 1953. The Corporation expects an output of 164 million pounds of flue-cured. In order to achieve the levels of output forecast from the acreages to be planted, yields must be somewhat higher than those obtained in the past two years.

Table 4 -- The Usual Dates Reported for Sowing, Transplanting, Topping and Harvesting of Tobaccos, by Kind - Japan

| | | Native | Virginia | Burley |
|---|---|---|---|---|
| Sowing | 1948-52 average | March 13 | February 14 | March 27 |
| | 1952 | March 12 | February 11 | March 27 |
| | 1953 | March 10 | February 9 | March 23 |
| Transplanting | 1948-52 average | May 16 | April 21 | June 2 |
| | 1952 | May 14 | April 16 | May 28 |
| | 1953 | May 13 | April 12 | May 26 |
| Topping | 1948-52 average | July 21 | June 19 | August 6 |
| | 1952 | July 18 | June 15 | August 6 |
| | 1953 | July 18 | June 14 | August 1 |
| Harvesting | 1948-52 average | August 17 | July 28 | September 5 |
| | 1952 | August 15 | July 29 | September 13 |
| | 1953 | August 16 | July 28 | August 31 |

Source: Japan Monopoly Corporation, Dates based on averages for the 1948-53 period.

## Exports of Unmanufactured Leaf

During the 1930's when Japan controlled the important tobacco producing areas of Taiwan (Formosa), Korea, Manchuria and northern China, the Japanese exports of unmanufactured tobacco were substantial. Most of these exports were taken by China, Egypt and Germany. Since 1950 small amounts of unmanufactured leaf have been exported. Most of the exports in the last couple of years have gone to Egypt, Western Germany, the United Kingdom and Switzerland. Exports may expand slightly but are not expected to increase much, if any, as land is greatly in demand for the production of foods.

## Imports of Unmanufactured Leaf

Imports of leaf declined from about 12 million pounds in 1935 to only 233,000 pounds in 1939. In this period most of the imports were from China, India, Philippine Islands and the United States. There were no imports reported in 1940, but the levels increased to about 5.7 million pounds in 1942 and 1943 and then fell to one-half million pounds in 1944. There were no imports from 1945 through 1948, but trade again opened up in 1949 with about two million pounds coming into the country from India that year. Since then imports have increased substantially. Practically all of the unmanufactured tobacco imported since 1948 has been flue-cured and sun-cured leaf from India and flue-cured from the United States.

High levels of production and sale of tobacco products are encouraged by many public officials due to the fact that a high proportion of total government revenue is obtained from the highly profitable tobacco operations of the Japan Monopoly Corporation. (Profits from tobacco operations of the Japan Monopoly Corporation were reported as about 16.7 percent of total government revenues in 1952 and may have been as high as 20 percent in 1953). Strong efforts are being made to become self-sufficient in the production of tobacco. U. S. flue-cured tobacco with its highly aromatic and good burning qualities is much in demand. However, as indicated above, dollar reserves declined in 1953 and this may continue to worsen to the extent that maintaining the current level of imports from the U. S. in the years ahead will be very difficult unless there are some arrangements for handling this problem.

Table 5 -- Imports of Unmanufactured Leaf Tobacco (Declared Weight) 1/

| Period | U. S. | India | Philippine Islands | China (excluding Manchuria) | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1935-39 (average) | 4,450 | 3,579 | 2,113 | 1,834 | 9,185 |
| 1945-49 (average) | none | 400 | none | none | 400 |
| 1950 | none | 2,770 | none | none | 2,770 |
| 1951 | 1,167 | 2,479 | none | none | 3,646 |
| 1952 | 8,069 | 14,669 | none | none | 22,739 |
| 1953 | 5,859 | 3/ | 3/ | 3/ | 3/ |

1/ Declared weight is the redried weight which is about 10 percent less than farm sales weight.

2/ None imported except in 1949 when 2,000,000 pounds were taken.

3/ Not yet available.

## Aging of Leaf

Flue-cured and Burley leaf are aged in hogsheads while Native leaf is stored in straw-covered bales.

## Tobacco Products

Cigarettes and pipe tobacco account for the bulk of tobacco consumed. Cigar production and consumption are relatively unimportant in Japan. Most of the cigars manufactured in Japan have been made from imported leaf. Practically no snuff or chewing tobacco is consumed.

In recent years the proportion of total tobacco in the cigarette blend accounted for by flue-cured leaf has increased substantially, while the proportion of native tobacco has declined. The use of higher proportions of Japanese flue-cured together with significant quantities of lighter-bodied U. S. flue-cured leaf in the blends has produced a milder, lighter type of cigarette. The milder cigarette is preferred and the Monopoly program for future production of leaf tobacco, at least in the next few years, indicates the intent to further increase the proportion of flue-cured in cigarette blends.

Several years ago a high percentage of Japanese cigarettes had mouthpieces (cardboard), but now are made without mouthpieces. The proportion of total cigarettes sold with mouthpieces has declined from about 22.4 percent in 1943-44 to approximately seven-tenths of one percent in 1952-53.

In the period after World War II before cigarette production facilities were restored and expanded, large quantities of cut tobacco were sold for hand-rolling cigarettes (32 to 36 million pounds in 1946-47 and 1948). As facilities became available the sales of this product declined rapidly to about 3.3 million pounds in 1949 with production for sale in this form ceasing in the fall of 1949.

Production of cigarettes in 1952 was estimated at about 81.6 billion. Data are not yet available for 1953 but it is reported that production continued to increase. Output increased throughout the 1930's (averaging about 37 billion per year during the period 1935-39) with this trend continuing upward until approximately 61.2 billion were produced in fiscal year 1943-44. Production declined to an average of 15 billion in fiscal years 1945-46 and 1946-47 but as plant capacity was restored and expanded and more ample supplies of leaf became available, output rose to about 19 billion 1947-48, and 34.8 billion in 1948-49. The trend has continued steadily upward since that time.

Table 6 -- Tobacco Products Manufactured in Japan

| Period | Type of Product | | | |
|---|---|---|---|---|
| | Cigarettes | Cut for use in hand-rolled cigarettes | Very fine cut for use in pipes 1/ | Cigars |
| | Million pieces | Thousand pounds | Thousand pounds | Thousand pieces |
| 1935-39 (average) | 37,044 | 2/ | 45,517 | 1,478 |
| 1945-49 (average) | 25,989 | 20,681 | 30,217 | 154 |
| 1950 | 64,501 | 2,737 | 22,843 | 416 |
| 1951 | 75,032 | 2/ | 23,031 | 141 |
| 1952 (est.) | 81,610 | 2/ | 18,298 | 394 |

1/ Coarse-cut is not shown separately, as only small amounts are used in foreign-style pipes.

2/ None reported.

Source: Based on information supplied by the Japan Monopoly Corporation

Most pipe tobacco is very fine-cut (finer than U. S. cigarette tobacco) and is smoked in small Japanese style pipes. Only very limited amounts of coarse-cut tobacco are used in foreign-style pipes. Consumption of pipe tobacco declined gradually during the 1930's with about the same rate of decrease continuing through the mid-1940's. Near the end of World War II, production of pipe tobacco broke sharply after which it rose slightly (1947-48 and 1948-49) then turned downward with the rate of decline in recent years continuing about in line with the prewar trend. Output of pipe tobacco is estimated at between 18 and 19 million pounds in 1952 as compared to over 45 million pounds annually in the mid-1930's. Although some representatives of the Japanese tobacco trade think that the 1952 estimate may be too low the sharp downward trend in recent years is evident from table 6 above.

## Improved Packaging and Display

In recent years great advancements have been made in connection with improved packaging as well as retail display of tobacco products.

## Imports of Tobacco Products

Some tobacco products are imported and this is likely to continue in order to fulfill the limited demand for these products. Presently there is no indication of any sharp change in the levels of imports in the near future. It is estimated that in 1952 about 67.3 million cigarettes were imported (40.7 million from the U. S. and 26.6 million from the United Kingdom). Only small amounts of pipe tobacco are imported, with most of that in recent years also coming from the U. S. and U. K.

## Exports of Manufactured Tobacco Products

From the mid 1930's until about the end of World War II relatively large quantities of manufactured tobacco products were exported. Since that time Japan has exported practically no tobacco products. While Japanese exports of tobacco products may increase somewhat, the outlook for the near future does not appear favorable for developing a large volume of export trade in these items.

## Conclusion

The domestic production of leaf is expected to continue upward in order to meet increased demand both in number of cigarettes as well as providing higher proportions of flue-cured in the cigarette blends. Strong efforts will continue to increase the quality of domestic leaf as well as the manufactured tobacco products.

Exports of leaf tobacco by Japan may increase somewhat but no large expansion in shipments of flue-cured is anticipated. Prices paid to Japanese farmers for flue-cured are now considerably above world prices for similar quality leaf, and the available land in Japan is much in demand for the production of food supplies which are now imported.

While U. S. flue-cured leaf is in demand for mixing with domestic tobaccos, increasing difficulties in regard to availability of dollars is likely to be a severely limiting factor in the importation of U. S. leaf unless alternative arrangements are made to overcome this problem.

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March 26, 1954

# SOUTH KOREA TO BUY U. S. FLUE-CURED TOBACCO

The Foreign Agricultural Service, United States Department of Agriculture, has been advised that South Korea will buy approximately five million dollars worth of U. S. Flue-cured tobacco.

The Office of Procurement, Seoul, Korea has announced that contracts will be awarded April 20th for three million dollars of U. S. flue-cured, basis c. and f., delivery at Korean ports by June 30, 1954. Two samples of each grade, with prices, each sample to weigh a kilogram, must be submitted to the Procurement Office at Seoul by April 15. Prices must be firm from April 15 through April 20, plus necessary time for cable notification of acceptance. Contracts will be direct without agent's commission, hwan or dollars. A performance bond of three percent will be required.

The Monopoly is interested in leaf, cutters and lugs; quality good through common; lemon, orange and mixed colors; mild, aromatic, light bodied, soft leaf. Strong flavor undesirable.

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April 9, 1954

# EGYPT'S TOBACCO IMPORTS SHOW DECREASE

Egypt's imports of unmanufactured tobacco in 1953 totaled 24.2 million pounds - 8 percent below the 1952 quantity of 26.4 million, according to a report from the American Embassy at Cairo. Since 1949, tobacco imports into Egypt have been decreasing. Higher rates of duty, imposed to increase the Government's revenue collections from tobacco, have resulted in higher consumer prices for tobacco products. This has reduced consumption and imports have declined. No tobacco is produced in Egypt under a prohibition in existence since 1890.

Most of the leaf tobacco imported into Egypt in 1953 consisted of oriental, flue-cured and Burley tobacco for use in the manufacture of cigarettes. The United States supplied 5.0 million pounds, or 21 percent of the total imports, and ranked second only to Turkey as a source of supply. In 1952, 4.2 million pounds, or 16 percent, originated in the United States. About 75 percent of the imports from the United States last year was flue-cured, and 24 percent, Burley. A little dark tobacco was imported from this country for use in chewing tobacco.

The Egyptian Government did not allocate any dollars at the official exchange rate for the purchase of United States leaf in 1953. Local manufacturers, however, secured import licenses covering United States tobacco, payable under the Export Account and Entitlement Account procedure which required the payment of a 10 percent premium above the official price of the dollar.

Turkey was in first position last year as a source of Egypt's leaf tobacco imports, supplying 6.2 million pounds. Greece, with 3.1 million ranked third. Other principal sources were Southern African countries (Southern Rhodesian flue-cured and Nyasaland fire-cured) with a total of 3.1 million pounds, and India, 2.2 million.

Imports of cigarettes totaled 333,000 pounds in 1953, compared with 407,000 pounds in 1952. The United States furnished 201,000 pounds in 1953 and 180,000 pounds during the previous year. Most of the balance came from the United Kingdom. Imports of other tobacco products were insignificant in both years. There has been a steady downtrend in imports of cigarettes in recent years. Increases in the rate of import duties are believed to have caused this decrease.

## Egypt: Imports of Unmanufactured Tobacco, by Country of Origin, Average 1946-50, Annual 1951-53

| Country of Origin | Average 1946-50 | 1951 | 1952 | 1953 |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Turkey | 10,191 | 8,025 | 7,667 | 6,165 |
| United States | 3,667 | 3,944 | 4,199 | 4,999 |
| Greece | 1,901 | 3,942 | 3,604 | 3,081 |
| India | 2,048 | 2,170 | 2,177 | 2,173 |
| China | 580 | 1,005 | 984 | 904 |
| Soviet Union | 272 | 1,342 | 1,080 | 881 |
| Union of South Africa | 832 | 1,051 | 939 | 826 |
| Other South African Countries | 4,420 | 4,035 | 3,821 | 3,090 |
| Other Countries | 3,009 | 2,396 | 1,930 | 2,122 |
| Total | 26,920 | 27,910 | 26,401 | 24,241 |

1/ Largely cigarette tobacco. Includes some "Hassan Keif" and Tombac for use in water pipes

2/ Mostly Southern Rhodesian Flue-cured and Nyasaland fire-cured

Compiled from official sources and Consular Reports

As recently as February 14, 1954, a new upward revision on cigarette import duties was announced. The new rate is approximately equivalent to U. S. $6.3[illegible] per pound, and compares with the previous rate of U. S. $5.62. This had the effect of increasing the retail price of standard brands of United States cigarettes to about 46 cents per package of 20, compared with about 43 cents in December 1953.

It is significant to U. S. tobacco trade interests that an increasing percentage of total Egyptian cigarette production consists of straight Virginia flue cured and blended types.

## Egypt: Percentage Breakdown of Tobacco Manufactures, 1951-1953

| | 1951 | 1952 | 1953 |
|---|---|---|---|
| | Percent | Percent | Percent |
| Cigarettes: | | | |
| Oriental type | 34.9 | 32.5 | 29.4 |
| Straight Virginia | 12.0 | 12.2 | 13.7 |
| U. S. blended type | 25.5 | 26.2 | 28.5 |
| Other | | | |
| Roll-your-own (oriental type) | 15.6 | 16.2 | 14.8 |
| Pipe tobacco and small cigars | 11.0 | 11.9 | 12.5 |
| Chewing tobacco | 1.0 | 1.0 | 1.0 |
| Total | 100.0 | 100.0 | 100.0 |

Consular sources

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# EXPORTS OF UNMANUFACTURED TOBACCO SUBSTANTIALLY HIGHER IN 1953

Exports of unmanufactured tobacco during 1953 were 516.4 million pounds valued at $339.0 million as compared with 396.3 million pounds valued at $246.3 million in 1952. This represents an increase of 30 percent in volume and an increase of 38 percent in value. Postwar annual (1947-51) average exports totaled 486.4 million pounds valued at $262.7 million. This corresponds to the prewar (1935-39) average of 420.8 million pounds valued at $127.8 million. Exports of flue-cured leaf increased substantially and there were lesser increases in exports of Maryland, Black Fat, Perique and Cigar leaf. All other types of leaf show a slight decrease over 1952.

Flue-cured Tobacco exports in 1953 totaled 442.0 million pounds compared to 319.3 million in 1952. This increase was largely due to increased purchases by the United Kingdom which took 175.4 million pounds compared to 50.3 million in 1952, a year when it restricted purchases because of an acute dollar problem. Other countries which took larger shipments in 1953 include Mexico, Uruguay, Norway, the Netherlands, Spain Portugal, Yugoslavia and Egypt. There were decreases in shipments to Canada, Belgium and Luxembourg, Germany, India and the Philippine Republic. Exports of flue-cured tobacco in 1953 were higher than in any previous period.

Burley Tobacco exports during 1953 totaled 25.0 million pounds, 7 percent less than the 26.9 million pounds exported in 1952. Burley exports to Mexico, Guatemala, Sweden, Denmark and East and West Germany were sharply lower than in 1952, but except for Denmark were well above prewar levels. On the other hand, 1953 exports to the United Kingdom Belgium and Luxembourg, Switzerland, Portugal, Italy, Yugoslavia, Hong Kong and Egypt were greater than in 1952. In 1953, Yugoslavia took substantial shipments of burley tobacco for the first time.

Kentucky-Tennessee Fire-cured Tobacco exports in 1953 declined to 19.5 million pounds from 21.8 million pounds in 1952 or 11 percent. Exports in 1953 were 60 percent and 21 percent respectively below the prewar and postwar average. Exports were lower in 1953 than in the previous year to such important markets as the United Kingdom, Ireland, the Netherlands, Switzerland, Sweden, Norway and Belgium and Luxembourg. Exports to France, historically the best market for this type, totaled 1,720,000 pounds in 1953. Prewar exports to that country exceeded 18 million pounds. Exports to Guatemala, Haiti, Spain, Indonesia and French West Africa were higher in 1953. Exports of Virginia fire-cured decreased from 4.9 million pounds in 1952 to 4.3 million in 1953. Norway continued as the most important outlet, taking 1.9 million pounds.

Black Fat exports increased in 1953 to 3.9 million pounds compared to 3.2 million in 1952. Nigeria and the Gold Coast continue as the most important markets.

Maryland Tobacco exports in 1953 reached a postwar high of 8.1 million pounds. Exports in 1952 totaled 5.8 million pounds. Switzerland, which took 5.5 million pounds, continued to be the largest export outlet. Appreciable gains were shown in exports to the Netherlands, Belgium and Luxembourg and Spain. Yugoslavia, which bought Maryland tobacco for the first time in 1953, took 749,000 pounds.

One Sucker Tobacco exports continued their downward trend. Exports totaled 1.0 million pounds in 1953 compared to 1.5 million in 1952. Exports to Nigeria, normally the largest market for this type, took only 610 thousand pounds in 1953 compared to 1.2 million in 1952. The only substantial gain was to the Netherlands which took 139 thousand pounds compared to 27 thousand in 1952.

Green River Tobacco exports declined in 1953 to 1.8 million pounds compared to 2.3 million in 1952. The United Kingdom continues to be the largest outlet taking 1.0 million pounds.

Cigar Tobacco exports totaled 7.6 million pounds in 1953 compared to 6.8 million in 1952. However, they were below their postwar (1947-51) average of 9.8 million pounds. Cigar wrapper accounted for 3.9 million pounds, cigar binder 3.1 million and cigar filler 587 thousand pounds. Exports of cigar wrapper and cigar binder increased over 1952 but cigar filler exports declined. However, cigar binder and cigar filler exports were below their postwar (1949-51) averages. Cigar wrapper exports were above the postwar average.

Perique exports in 1953 totaled 66 thousand pounds compared to 60 thousand pounds in 1952 and a postwar (1947-51) average of 79 thousand pounds. The United Kingdom continued as the most important market taking 36 thousand pounds or 55 percent of the total.

Stems, Trimmings and Scrap exports in 1953 totaled 3.0 million pounds compared to 3.6 million in 1952. This reflects a continued downward trend from prewar and postwar exports. Tangier was the largest export outlet taking 1.0 million pounds. There were substantial declines in shipments to the Netherlands, Jordan and Hong Kong over 1952. However, there were increased takings by Uruguay, Denmark, West Germany and the Canary Islands.

UNITED STATES: Exports of unmanufactured tobacco by types,
calendar year 1953, with comparisons

(Declared Weight)

| Type | Average 1935-39 |  | Average 1947-51 |  | 1952 |  | 1953 1/ |  |
|---|---|---|---|---|---|---|---|---|
|  | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars |
| Flue-cured | 312,889 | 112,466 | 388,078 | 214,995 | 319,270 | 201,575 | 441,998 | 295,034 |
| Burley | 10,635 | 2,253 | 32,865 | 14,739 | 26,871 | 14,408 | 25,007 | 13,053 |
| Dark-fired Kentucky |  |  |  |  |  |  |  |  |
| Tennessee | 48,959 | 6,379 | 24,591 | 9,844 | 21,752 | 10,404 | 19,485 | 9,544 |
| Dark-fired Virginia | 9,049 | 2,101 | 6,046 | 3,080 | 4,860 | 3,122 | 4,276 | 2,759 |
| Virginia Sun-cured 2/ | - | - | - | - | 277 | 151 | 42 | 31 |
| Maryland | 5,390 | 1,236 | 7,349 | 4,313 | 5,807 | 4,226 | 8,135 | 5,276 |
| Green River | 3,019 | 609 | 1,726 | 595 | 2,260 | 1,060 | 1,829 | 717 |
| One Sucker | 956 | 82 | 3,063 | 1,272 | 1,535 | 1,168 | 1,023 | 674 |
| Black Fat | 8,867 | 1,629 | 4,669 | 2,604 | 3,204 | 2,426 | 3,381 | 2,964 |
| Cigar leaf |  |  |  |  |  |  |  |  |
| Wrapper | - | - | - | - | 3,061 | 4,474 | 3,901 | 5,812 |
| Binder | - | - | - | - | 2,848 | 2,500 | 3,100 | 2,599 |
| Filler | - | - | - | - | 853 | 309 | 587 | 175 |
| Total cigar leaf | 2/ 1,269 | 524 | 2/ 9,770 | 10,565 | 6,762 | 7,283 | 7,588 | 8,586 |
| Perique | 132 | 52 | 79 | 62 | 60 | 53 | 66 | 66 |
| Trimmings, stems, and scrap | 19,632 | 466 | 3,116 | 647 | 3,622 | 387 | 3,027 | 366 |
| Total | 420,797 | 127,797 | 486,352 | 262,716 | 396,280 | 246,263 | 516,357 | 339,070 |

1/ Preliminary. 2/ Class established January 1952.

Compiled in Foreign Agricultural Service from the records of the Bureau of the Census.

UNITED STATES: Exports of flue-cured tobacco, calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Average 1935-39 | Average 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 4,331 | 161 | 471 | 55 |
| CENTRAL AMERICA: | | | | |
| Mexico | 3 | 478 | 738 | 1,326 |
| Guatemala | 55 | 314 | 348 | 455 |
| British Honduras | 19 | 36 | 12 | 11 |
| El Salvador | 38 | 527 | 610 | 550 |
| Honduras | 18 | 88 | 141 | 176 |
| Nicaragua | 93 | 310 | 384 | 457 |
| Costa Rica | 15 | 48 | 38 | 47 |
| Panama, Republic of | 10 | 12 | - | - |
| Bermuda | 1 | - | - | - |
| Bahamas | - | 1 | 4 | 7 |
| Cuba | 2 | - | - | - |
| Jamaica | 384 | 14 | - | 35 |
| Haiti | 13 | 93 | 106 | 74 |
| Dominican Republic | 3 | - | - | - |
| Leeward and Windward Islands | - | 45 | 76 | 122 |
| Barbados | 91 | 7 | 2 | 5 |
| Trinidad and Tobago | 449 | 102 | 23 | 22 |
| Other British West Indies | 29 | - | - | - |
| Netherlands Antilles | 3/ | - | 1 | 34 |
| French West Indies | 1 | - | - | - |
| SOUTH AMERICA: | | | | |
| Colombia | 55 | 302 | - | - |
| Venezuela | 4 | 166 | 512 | 463 |
| British Guiana | 155 | 328 | 350 | 309 |
| Surinam (Netherlands Guiana) | 9 | 34 | 134 | 99 |
| Ecuador | 2 | - | - | - |
| Peru | 33 | 154 | - | - |
| Bolivia | - | 1 | - | - |
| Chile | 6 | 78 | 46 | 60 |
| Brazil | 41 | 64 | - | 3 |
| Paraguay | 1 | 10 | 20 | 8 |
| Uruguay | 229 | 979 | 247 | 1,059 |
| Argentina | 926 | 1,110 | - | - |
| EUROPE: | | | | |
| Iceland | - | 20 | - | - |
| Sweden | 3,642 | 6,938 | 6,576 | 7,043 |
| Norway | 2,487 | 4,479 | 4,314 | 4,114 |
| Denmark | 2,498 | 7,577 | 6,991 | 9,906 |
| United Kingdom | 193,519 | 174,736 | 50,330 | 175,340 |
| Ireland | 6,081 | 16,926 | 15,272 | 16,877 |

Continued -

UNITED STATES: Exports of flue-cured tobacco, calendar year 1953, with comparisons, by countries of destination (Con't)

(Declared weight)

| Country of Destination | Average 1935-39 | Average 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Netherlands | 9,490 | 23,672 | 26,796 | 29,819 |
| Belgium and Luxembourg | 3,712 | 15,479 | 10,785 | 7,535 |
| France | 1,071 | 1,684 | 5,746 | 2,269 |
| Germany | 4,060 | 36,803 | 9/ 66,276 | 9/ 61,006 |
| Austria | 12 | 3,043 | 3,380 | 2,055 |
| Czechoslovakia | 16 | 201 | - | - |
| Hungary | 9 | - | - | - |
| Switzerland | 257 | 3,990 | 2,909 | 3,108 |
| Finland | 1,028 | 1,668 | 3,001 | 2,794 |
| Estonia | 169 | - | - | - |
| Latvia | 232 | - | - | - |
| Lithuania | 78 | - | - | - |
| Poland and Danzig | 811 | 82 | - | - |
| USSR | - | 2,086 | - | - |
| Azores | 4/ 20 | 36 | 72 | 56 |
| Spain | 137 | 380 | 772 | 1,476 |
| Portugal | 803 | 3,358 | 2,853 | 4,144 |
| Gibraltar | 16 | 8 | - | - |
| Malta, Gozo, and Cyprus | 292 | 1,193 | 995 | 1,348 |
| Italy | 99 | 3,059 | 2,216 | 4,409 |
| Free Territory of Trieste | - | 157 | - | - |
| Yugoslavia | 1 | 3 | 1,350 | 2,707 |
| Greece | 1 | 8 | - | - |
| Rumania | 37 | - | - | - |
| ASIA: | | | | |
| Syria | ( 4 | 25 | 54 | 12 |
| Lebanon | ( | 17 | 55 | 27 |
| Iraq | 3 | - | - | - |
| Palestine | 25 | 799 | 226 | 255 |
| Jordan | - | 124 | 221 | 279 |
| Kuwait | - | 31 | - | - |
| Saudi Arabia | - | 3 | - | - |
| Aden | 4 | 24 | 70 | 70 |
| India | 2,903 | 7,484 | 3,963 | 1,169 |
| Pakistan | - | 543 | 1,840 | 1,714 |
| Ceylon | 924 | 972 | 1,304 | 961 |
| Burma | - | - | - | 19 |
| Thailand | 3,202 | 3,314 | 6,126 | 6,634 |
| French Indochina | 190 | 1,589 | 2,817 | 3,232 |

Continued -

UNITED STATES: Exports of flue-cured tobacco, calendar year 1953, with comparisons, by countries of destination (Con't)

(Declared weight)

| Country of Destination | Average 1935-39 | Average 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| British Malaya | 118 | - | - | 14 |
| Indonesia | 2,021 | 6,419 | 13,203 | 12,475 |
| Macao | - | - | 30 | 29 |
| Philippine Republic | 703 | 6,924 | 28,386 | 19,573 |
| Portuguese Asia | - | 10 | - | - |
| China | 5/ 33,885 | 9,714 | - | - |
| Hong Kong | 1,624 | 4,338 | 3,534 | 3,695 |
| Taiwan | - | 377 | 954 | 1,262 |
| Japan | 4,842 | 385 | 7,340 | 9,510 |
| OCEANIA: | | | | |
| Australia | 19,093 | 19,964 | 23,632 | 26,230 |
| New Zealand | 2,708 | 5,511 | 5,132 | 5,508 |
| AFRICA: | | | | |
| Morocco | 16 | 175 | 157 | 87 |
| Algeria | ( 88 | 266 | 168 | 297 |
| Tunisia | ( | 137 | 54 | 165 |
| Egypt | 926 | 2,562 | 2,612 | 4,225 |
| Canary Islands | 22 | 85 | 10 | - |
| Spanish Africa | - | 3 | - | - |
| Cameroon | - | 40 | 105 | 24 |
| French Equatorial Africa | - | 20 | - | - |
| French West Africa | 6/ 132 | 116 | - | 33 |
| Gold Coast | 8 | 8 | - | - |
| Nigeria | 210 | 856 | 1,004 | 1,199 |
| British West Africa | 200 | 4 | - | - |
| Madeira Islands | 4/ - | 8 | 7 | 5 |
| Angola | - | 36 | 85 | 70 |
| Western Portuguese Africa | 7/ 44 | 19 | 15 | 32 |
| Liberia | 6 | 6 | - | 6 |
| Belgian Congo | - | 70 | 124 | 490 |
| Mauritius and Dependencies | - | 146 | 110 | 55 |
| British East Africa | - | 1,202 | 991 | 1,054 |
| Mozambique | 13 | 57 | 40 | 62 |
| Madagascar | - | 2 | 4 | 20 |
| Union of South Africa | 66 | 645 | - | 123 |
| Southern British Africa | 2 | - | - | - |
| Total quantity | 312,889 | 388,078 | 319,270 | 441,998 |
| Total value, 1,000 dollars | 112,466 | 214,995 | 201,575 | 295,034 |

See footnotes at end of circular.

UNITED STATES: Exports of Burley tobacco, calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 453 | 138 | - | - |
| CENTRAL AMERICA: | | | | |
| Mexico | 99 | 1,005 | 2,214 | 1,510 |
| Guatemala | 9 | 155 | 286 | 111 |
| British Honduras | 8 | 7 | 2 | 22 |
| El Salvador | 1 | 5 | - | - |
| Honduras | 3/ | 9 | 9 | 11 |
| Nicaragua | 47 | 83 | 146 | 115 |
| Costa Rica | 10 | 32 | 27 | 29 |
| Panama, Republic of | - | 3 | - | - |
| Bahamas | - | - | 3 | - |
| Haiti | 2 | 32 | 46 | 29 |
| Dominican Republic | 23 | - | - | - |
| Leeward and Windward Islands | - | 1 | 9 | 8 |
| Trinidad and Tobago | - | 20 | 100 | 71 |
| Other British West Indies | 7 | - | - | - |
| SOUTH AMERICA: | | | | |
| Colombia | 2 | 16 | - | - |
| Venezuela | 3/ | 13 | 11 | - |
| Surinam | 2 | 40 | - | - |
| Ecuador | 1 | - | - | - |
| Peru | 4 | 44 | 109 | - |
| Chile | 8 | 67 | 171 | 174 |
| Brazil | 9 | 27 | - | - |
| Uruguay | 30 | 65 | 39 | 45 |
| Argentina | 160 | 645 | - | - |
| EUROPE: | | | | |
| Sweden | 605 | 1,721 | 2,877 | 1,406 |
| Norway | 434 | 1,181 | 685 | 739 |
| Denmark | 827 | 1,559 | 1,710 | 737 |
| United Kingdom | 279 | 702 | 280 | 421 |
| Ireland | 10 | 5 | 4 | 4 |
| Netherlands | 1,000 | 2,896 | 783 | 857 |
| Belgium and Luxembourg | 1,996 | 3,555 | 2,715 | 3,044 |
| France | 214 | 1,675 | 974 | 707 |
| Germany, West | ( 467 | ( 6,077 | 7,677 | 4,910 |
| Germany, East | ( | ( | - | - |
| Austria | 17 | 774 | 1,204 | 850 |
| Czechoslovakia | 25 | 59 | - | - |

Continued -

UNITED STATES: Exports of Burley tobacco, calendar year 1953 with comparisons, by countries of destination (cont'd)

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Hungary | 3 | - | - | - |
| Switzerland | 46 | 536 | 338 | 1,078 |
| Finland | 72 | 231 | 458 | 524 |
| Estonia | 1 | - | - | - |
| Latvia | 5 | - | - | - |
| Lithuania | 7 | - | - | - |
| Poland and Danzig | 43 | - | - | - |
| Azores | 4/ 3 | 29 | 16 | 15 |
| Spain | 69 | 170 | - | - |
| Portugal | 2,498 | 4,747 | 1,870 | 3,005 |
| Gibraltar | 1 | - | - | - |
| Malta, Gozo, and Cyprus | 10 | 1 | - | - |
| Italy | 145 | 2,548 | 24 | 582 |
| Free Territory of Trieste | - | 20 | - | - |
| Yugoslavia | - | - | - | 851 |
| ASIA: | | | | |
| Syria | ( 3/ | 4 | 8 | 10 |
| Lebanon | ( | 30 | - | - |
| Iraq | - | 3/ | - | 14 |
| Israel and Palestine | - | 4 | - | - |
| India | 3/ | 4 | 9 | - |
| Ceylon | 10 | - | - | - |
| Siam (Thailand) | - | 7 | - | - |
| French Indochina | 8 | 48 | 15 | - |
| Indonesia | 101 | 42 | 4 | - |
| Republic of the Philippines | 5 | 370 | 1,165 | 1,234 |
| China | 32 | 1 | - | - |
| Hong Kong | - | 4 | 38 | 353 |
| Taiwan | - | - | 5 | - |
| Japan | 1 | 1 | 3/ | - |
| OCEANIA: | | | | |
| Australia | 557 | 164 | 114 | 168 |
| New Zealand | 3 | - | - | - |
| AFRICA: | | | | |
| French Morocco | 3/ | 50 | - | - |
| Algeria | (213 | 108 | 21 | 91 |
| Tunisia | ( | 143 | 102 | - |
| Egypt | 21 | 913 | 536 | 1,205 |
| Canary Islands | 3 | - | - | 3 |
| Cameroon | - | - | - | 28 |
| French West Africa | 6/ 3 | 12 | - | 6 |

Continued -

UNITED STATES: Exports of Burley tobacco, calendar year 1953, with comparisons, by countries of destination (cont'd)

(Declared weight)

| Country of Destination | Averages | | | |
|---|---|---|---|---|
| | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Gold Coast | 1 | - | 3 | - |
| Nigeria | 5 | - | - | 2 |
| Madeira Islands | 4/ | 1 | 2 | - |
| Angola | - | 43 | 42 | 28 |
| Western Portuguese Africa, n.e.s. | 20 | 1 | - | - |
| Liberia | 3/ | - | 3 | - |
| Belgian Congo | - | 6 | - | - |
| Mozambique | - | 5 | 10 | 10 |
| Union of South Africa | 3/ | 11 | 7 | - |
| Total Quantity | 10,635 | 32,865 | 26,871 | 25,007 |
| Total Value 1,000 dollars | 2,253 | 14,739 | 14,408 | 13,053 |

See footnotes at end of circular.

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco, calendar year 1953 with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 151 | 56 | 73 | 34 |
| CENTRAL AMERICA: | | | | |
| Mexico | 47 | 3/ | - | - |
| Guatemala | - | - | 76 | 242 |
| British Honduras | 1 | 29 | 26 | 33 |
| El Salvador | 13 | - | - | - |
| Honduras | 3/ | 2 | - | - |
| Nicaragua | 2 | - | - | 3 |
| Panama, Republic of | 118 | 55 | 67 | 64 |
| Canal Zone | - | - | - | 3 |
| Bahamas | - | 32 | 79 | 86 |
| Cuba | - | 5 | - | - |
| Jamaica | 2 | 3 | 2 | 2 |
| Haiti | 9 | 4 | 99 | 300 |
| Leeward and Windward Islands | - | 23 | 21 | 16 |
| Trinidad and Tobago | 8 | 2 | 1 | 2 |
| Netherlands Antilles | 4 | 4 | 1 | 2 |
| French West Indies | 56 | 6 | - | - |
| Other British West Indies | 19 | - | - | - |
| SOUTH AMERICA: | | | | |
| Venezuela | 1 | - | - | - |
| British Guiana | 63 | 35 | 41 | 23 |
| Surinam (Netherlands Guiana) | 9 | 15 | 15 | 7 |
| French Guiana | 6 | 2 | - | 4 |
| Chile | - | 3/ | 3/ - | 1 |
| Brazil | 23 | 28 | 20 | 1 |
| Paraguay | 2 | - | - | - |
| Uruguay | 28 | 39 | - | 34 |
| Argentina | 150 | 274 | - | - |
| EUROPE: | | | | |
| Iceland | - | 71 | 71 | - |
| Sweden | 2,191 | 1,631 | 1,661 | 651 |
| Norway | 548 | 369 | 401 | 278 |
| Denmark | 1,055 | 593 | 466 | 561 |
| United Kingdom | 2,739 | 1,217 | 2,633 | 298 |
| Ireland | 724 | 636 | 1,038 | 564 |
| Netherlands | 4,832 | 3,964 | 7,084 | 5,368 |
| Belgium and Luxembourg | 4,441 | 2,160 | 1,024 | 633 |
| France | 18,316 | 4,329 | - | 1,720 |
| Germany, West | ( 3,022 | ( 1,007 | 732 | 931 |
| Germany, East | ( | ( | - | - |

Continued -

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco, calendar year 1953 with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Austria | 29 | 43 | 20 | - |
| Czechoslovakia | - | 4 | - | - |
| Switzerland | 2,273 | 2,602 | 2,328 | 1,761 |
| Finland | 82 | 71 | - | 20 |
| Estonia | 5 | - | - | - |
| Latvia | 32 | - | - | - |
| Lithuania | 6 | - | - | - |
| Poland and Danzig | 858 | - | - | - |
| Azores | 4/ 30 | 95 | 57 | 75 |
| Spain | 2,568 | 400 | - | 1,851 |
| Portugal | 1,107 | 390 | 363 | 228 |
| Gilbraltar | 3 | - | - | - |
| Malta, Gozo, and Cyprus | 145 | 64 | 4 | 37 |
| Italy | 427 | 1,415 | 626 | 624 |
| Free Territory of Trieste | - | - | - | 16 |
| Yugoslavia | 3 | - | - | - |
| ASIA: | | | | |
| Turkey | - | - | - | 14 |
| Aden | 1 | - | - | - |
| India | 12 | 1 | 13 | - |
| French Indochina | 235 | 40 | 243 | 72 |
| British Malaya | 1 | - | - | - |
| Indonesia | 69 | 49 | 87 | 520 |
| Republic of the Philippines | 5 | - | - | - |
| China | 1 | - | - | - |
| Japan | 20 | 1 | 8 | - |
| OCEANIA: | | | | |
| Australia | 3 | - | 7 | 3 |
| New Zealand | 5 | 69 | 87 | 128 |
| AFRICA: | | | | |
| French Morocco | 44 | 182 | - | - |
| Tangier | - | 18 | - | - |
| Algeria | ( 767 | 445 | 101 | 71 |
| Tunisia | ( | 382 | 282 | 188 |
| Egypt | 285 | 242 | 83 | 134 |
| Canary Islands | 507 | 221 | 140 | 110 |
| Spanish Africa, n.e.s. | 18 | 14 | 1 | 22 |
| Cameroon | - | 158 | 179 | 190 |
| French Equatorial Africa | - | 120 | 21 | 41 |
| French West Africa | 6/ 635 | 496 | 111 | 668 |
| Gold Coast | 102 | 297 | 544 | 455 |
| Nigeria | 19 | 39 | 10 | 4 |

Continued -

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco, calendar year 1953 with comparisons, by countries of destination

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| British West Africa, n.e.s. | 20 | 5 | - | 15 |
| Angola | - | 31 | 4 | 14 |
| Western Portuguese Africa, n.e.s. | 7/ 29 | 61 | 238 | 63 |
| Liberia | 25 | 30 | 39 | 19 |
| Belgian Congo | 2 | 6 | 525 | 276 |
| Mozambique | 3/ | - | - | - |
| Madagascar | 5 | 9 | - | 5 |
| Union of South Africa | 1 | - | - | - |
| Total quantity | 48,959 | 24,591 | 21,752 | 19,485 |
| Total value, 1,000 dollars | 6,379 | 9,844 | 10,404 | 9,544 |

See footnotes at end of circular.

UNITED STATES: Exports of Virginia Fire-cured Tobacco, calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 143 | 7 | - | - |
| CENTRAL AMERICA: | | | | |
| Mexico | 34 | 15 | - | - |
| Guatemala | 3/ | 3 | - | - |
| El Salvador | 4 | - | - | - |
| Costa Rica | 12 | - | - | - |
| Panama, Republic of. | 1 | 1 | - | - |
| Leeward and Windward Islands | - | 2 | 1 | - |
| Barbados | 4 | - | - | - |
| Trinidad and Tobago | 63 | 123 | 122 | 154 |
| Netherlands Antilles | 2 | - | - | - |
| Other British West Indies | 4 | - | - | - |
| SOUTH AMERICA: | | | | |
| Colombia | 1 | - | - | - |
| Venezuela | 1 | - | - | - |
| British Guiana | 1 | - | - | - |
| Surinam | 2 | - | - | - |
| Ecuador | 1 | - | - | - |
| Peru | 4 | - | 109 | - |
| Bolivia | 3/ | 1 | - | - |
| Brazil | 2 | - | - | - |
| Paraguay | 4 | 3 | - | - |
| Uruguay | 10 | 1 | - | 9 |
| Argentina | 112 | - | - | - |
| EUROPE: | | | | |
| Sweden | 815 | 703 | 867 | 486 |
| Norway | 2,033 | 1,752 | 1,767 | 1,880 |
| Denmark | 171 | 104 | 12 | 60 |
| United Kingdom | 1,471 | 418 | 156 | 284 |
| Ireland | 161 | 26 | 16 | 34 |
| Netherlands | 455 | 589 | 5 | 125 |
| Belgium and Luxembourg | 356 | 305 | 63 | 7 |
| France | 197 | 14 | - | 17 |
| Germany, West | ( 1,005 | ( 263 | 418 | 283 |
| Germany, East | ( | ( | - | - |
| Austria | 92 | 244 | 416 | 215 |
| Czechoslovakia | 109 | 34 | - | - |
| Switzerland | 130 | 536 | 464 | 266 |
| Finland | 10 | 32 | - | - |
| Estonia | 7 | - | - | - |
| Latvia | 8 | - | - | - |

Continued -

UNITED STATES: Exports of Virginia Fire-cured Tobacco, calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages | | | |
|---|---|---|---|---|
| | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Lithuania | 2 | - | - | - |
| Poland and Danzig | 11 | - | - | - |
| Azores | 4/ 6 | 3/ | - | - |
| Portugal | 345 | 126 | - | 22 |
| Malta, Gozo, and Cyprus | 5 | - | - | - |
| Italy | 85 | 14 | 15 | - |
| Yugoslavia | 5 | - | - | - |
| Greece | 2 | - | - | - |
| Rumania | 2 | - | - | - |
| ASIA: | | | | |
| Israel and Palestine | - | 7 | - | - |
| Aden | 2 | - | - | - |
| India | 4 | 35 | 19 | 24 |
| French Indochina | 3 | 79 | 9 | - |
| Indonesia | 36 | 37 | - | - |
| Philippines, Republic of | 3/ | 27 | - | - |
| China | 28 | 1 | - | - |
| Hong Kong | - | 31 | - | - |
| Taiwan | - | 10 | - | - |
| OCEANIA: | | | | |
| Australia | 236 | 115 | 192 | 270 |
| New Zealand | 276 | 262 | 209 | 130 |
| AFRICA: | | | | |
| French Morocco | - | 6 | - | - |
| Algeria and Tunisia | 170 | 16 | - | - |
| Egypt | 22 | 4 | - | - |
| Canary Islands | 8 | 54 | - | - |
| Spanish Africa | 4 | - | - | - |
| Cameroon | - | 24 | - | - |
| French West Africa | 6/ 235 | 11 | - | 10 |
| Gold Coast | 25 | 3 | - | - |
| British West Africa | 10 | - | - | - |
| Angola | - | 3 | - | - |
| Western Portuguese Africa | 7/ 10 | 1 | - | - |
| Liberia | 82 | 4 | - | - |
| Mozambique | 5 | - | - | - |
| Madagascar | 5 | - | - | - |
| Total quantity | 9,049 | 6,046 | 4,860 | 4,276 |
| Total value, 1,000 dollars | 2,101 | 3,080 | 3,122 | 2,759 |

See footnotes at end of circular.

**UNITED STATES:** Exports of Virginia sun-cured tobacco 2/ calendar year by countries of destination

(Declared weight)

| Country of Destination | 1952 | 1953 1/ |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| CENTRAL AMERICA: | | |
| Leeward and Windward Islands | 2 | - |
| EUROPE: | | |
| Norway | 274 | - |
| Netherlands | 1 | - |
| Germany, West | - | 34 |
| Switzerland | - | 6 |
| AFRICA: | | |
| Algeria | - | 2 |
| Total quantities | 277 | 42 |
| Total value, 1,000 dollars | 151 | 31 |

UNITED STATES: Exports of Black Fat, calendar year 1953 with comparisons by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 2 | 2 | - | - |
| CENTRAL AMERICA: | | | | |
| British Honduras | 44 | 13 | - | - |
| El Salvador | 1 | - | - | - |
| Honduras | - | 1 | - | - |
| Nicaragua | 3 | - | - | - |
| Panama, Republic of | 6 | 1 | - | - |
| Bahamas | - | 63 | 41 | 33 |
| Jamaica | 1 | 1 | 4 | - |
| Haiti | 8 | 5 | 4 | - |
| Dominican Republic | 1 | 1 | - | - |
| Leeward and Windward Islands | - | 21 | 8 | 9 |
| Barbados | 2 | - | - | - |
| Trinidad and Tobago | 1 | 1 | - | - |
| Netherlands Antilles | 77 | 38 | 35 | 37 |
| French West Indies | 141 | 6 | 3/ | 3/ |
| Other British West Indies | 154 | - | - | - |
| SOUTH AMERICA: | | | | |
| British Guiana | 112 | 43 | - | - |
| Surinam | 37 | 8 | 4 | 2 |
| French Guiana | 28 | 8 | - | 3 |

Continued -

UNITED STATES: Exports of Black Fat, calendar year 1953 with comparisons by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| EUROPE: | | | | |
| Norway | 1 | - | - | - |
| Denmark | 7 | - | - | - |
| United Kingdom | 28 | 3/ | - | - |
| Netherlands | 28 | 6 | 2 | - |
| Belgium and Luxembourg | 89 | 3/ | - | - |
| Germany, West | ( 168 | ( - | - | - |
| Germany, East | ( | ( | - | - |
| Austria | 1 | - | - | - |
| Switzerland | 3 | 6 | - | - |
| Azores | 4/ 1 | - | - | - |
| Portugal | 7 | 20 | - | - |
| Malta, Gozo, and Cyprus | 5 | 3 | - | - |
| ASIA: | | | | |
| India | 4 | - | - | - |
| Portuguese Asia | - | 5 | - | - |
| China | 2 | 8 | - | - |
| OCEANIA: | | | | |
| Australia | 2 | - | - | - |
| AFRICA: | | | | |
| French Morocco | 1 | 1 | - | - |
| Algeria and Tunisia | 3 | - | - | - |
| Egypt | 4 | 1 | - | - |
| Anglo-Egyptian Sudan | - | 1 | - | - |
| Canary Islands | 104 | 34 | 31 | 34 |
| Spanish Africa | 67 | 4 | 16 | 4 |
| Cameroon | - | 95 | 30 | 69 |
| French Equatorial Africa | - | 142 | - | - |
| French West Africa | 6/ 2,691 | 708 | 3 | 494 |
| Gold Coast | 1,301 | 1,147 | 1,332 | 1,047 |
| Nigeria | 2,687 | 2,006 | 1,426 | 2,055 |
| British West Africa | 481 | - | - | - |
| Angola | - | 36 | 93 | - |
| Western Portuguese Africa | 7/ 326 | 209 | 170 | 94 |
| Liberia | 215 | 22 | - | - |
| Belgian Congo | 7 | 2 | 5 | - |
| Seychelles and Dependencies | - | 1 | - | - |
| British East Africa | 1 | 3/ | - | - |
| Mozambique | 2 | - | - | - |
| Madagascar | 7 | - | - | - |
| Union of South Africa | 2 | - | - | - |
| Southern British Africa | 4 | - | - | - |
| Total Quantity | 8,867 | 4,669 | 3,204 | 3,881 |
| Total Value, 1,000 dollars | 1,629 | 2,604 | 2,426 | 2,964 |

See footnotes at end of circular.

UNITED STATES: Exports of Maryland tobacco, calendar year 1953, with comparisons, by country of destination

(Declared weight)

| Country of Destination | Averages | | | |
|---|---|---|---|---|
| | 1935-39 | 1947-51 | 1952 | 1953 1/ |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 3/ | 8 | - | - |
| CENTRAL AMERICA: | | | | |
| Guatemala | 3/ | 3/ | 15 | - |
| Honduras | 3/ | 1 | 2 | 2 |
| Trinidad and Tobago | - | - | 8 | - |
| SOUTH AMERICA: | | | | |
| Surinam | 3/ | 3/ | - | 1 |
| EUROPE: | | | | |
| Sweden | 26 | - | - | - |
| Norway | 5 | 11 | - | - |
| Denmark | 127 | 44 | 26 | 20 |
| United Kingdom | 34 | 31 | - | - |
| Netherlands | 1,833 | 557 | 378 | 441 |
| Belgium and Luxembourg | 427 | 233 | 138 | 300 |
| France | 668 | 354 | 5 | - |
| Germany, West | ( 173 | ( 308 | 184 | 252 |
| Germany, East | ( | ( | - | 110 |
| Austria | 52 | 24 | - | - |
| Czechoslovakia | 8 | - | - | - |
| Switzerland | 1,602 | 4,843 | 4,519 | 5,546 |
| Finland | - | 4 | - | - |
| Estonia | 5 | - | - | - |
| Poland and Danzig | 2 | - | - | - |
| Spain | 21 | 98 | 83 | 328 |
| Portugal | - | 3 | - | - |
| Gibraltar | - | - | - | 110 |
| Italy | 19 | 3/ | 1 | - |
| Yugoslavia | - | - | - | 749 |
| ASIA: | | | | |
| Israel | - | 1 | - | - |
| Thailand | - | 3/ | - | - |
| French Indochina | - | 10 | - | - |
| Philippines, Republic of | 3/ | 54 | - | - |
| China | 2 | - | - | - |
| OCEANIA: | | | | |
| Australia | 1 | 6 | 11 | 18 |
| AFRICA: | | | | |
| French Morocco | 49 | 402 | 278 | 202 |
| Algeria | ( 333 | 58 | 15 | - |
| Tunisia | ( | 299 | 143 | 44 |
| Egypt | 1 | - | - | 8 |
| Canary Islands | 1 | - | - | - |
| Liberia | 1 | 3/ | - | - |
| Mozambique | - | 3/ | 1 | 4 |
| Total Quantity | 5,390 | 7,349 | 5,807 | 8,135 |
| Total Value, 1,000 dollars | 1,236 | 4,313 | 4,226 | 5,276 |

See footnotes at end of circular.

## UNITED STATES: Exports of One Sucker tobacco, calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 30 | 26 | - | - |
| CENTRAL AMERICA: | | | | |
| Haiti | 1 | 3/ | - | - |
| Barbados | 3 | - | - | - |
| Trinidad and Tobago | 51 | 48 | 43 | 28 |
| Netherlands Antilles | 3/ | 2 | - | - |
| French West Indies | 2 | - | - | - |
| SOUTH AMERICA: | | | | |
| Surinam | - | 2 | - | - |
| Argentina | 1 | - | - | - |
| EUROPE: | | | | |
| Norway | 3/ | 8 | 11 | 17 |
| Denmark | 6 | 3/ | - | - |
| United Kingdom | 5 | 18 | 2 | - |
| Ireland | 2 | - | - | - |
| Netherlands | 14 | 262 | 27 | 139 |
| Belgium and Luxembourg | 682 | 293 | 188 | 157 |
| France | - | 747 | - | - |
| Germany, West | ( 13 | ( 73 | - | 4 |
| Germany, East | ( | ( | - | - |
| Austria | - | 11 | - | - |
| Switzerland | 9 | 2 | 12 | 2 |
| Spain | - | 242 | - | - |
| Portugal | - | 1 | - | - |
| Yugoslavia | - | - | - | 55 |
| ASIA: | | | | |
| Philippines, Republic of | 2 | - | - | - |
| Portuguese Asia | - | 1 | - | - |
| AFRICA: | | | | |
| French Morocco | - | 60 | - | - |
| Algeria | - | 44 | - | - |
| Tunisia | - | 113 | - | - |
| Canary Islands | 16 | 9 | - | - |
| Spanish Africa | 1 | - | - | - |
| Cameroon | - | 18 | 41 | 9 |
| French Equatorial Africa | - | 26 | - | - |
| French West Africa | 6/ 61 | 72 | 42 | 2 |
| Gold Coast | 11 | 40 | 9 | - |
| Nigeria | 5 | 800 | 1,152 | 610 |
| British West Africa | 25 | - | - | - |
| Western Portuguese Africa | 7/ 3 | 57 | - | - |
| Liberia | 13 | 88 | 8 | - |
| Total Quantity | 956 | 3,063 | 1,535 | 1,023 |
| Total Value, 1,000 dollars | 82 | 1,272 | 1,168 | 674 |

See footnotes at end of circular.

## UNITED STATES: Exports of Green River tobacco, calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 5 | - | - | - |
| CENTRAL AMERICA: | | | | |
| Panama, Republic of | - | 1 | - | - |
| Haiti | - | 5 | 13 | - |
| French West Indies | 4 | - | - | - |
| EUROPE: | | | | |
| Sweden | 11 | 3/ | - | - |
| Norway | 9 | 5 | - | - |
| Denmark | 1 | - | - | - |
| United Kingdom | 1,957 | 505 | 1,286 | 1,026 |
| Ireland | 156 | 57 | 40 | 17 |
| Netherlands | 37 | 243 | 348 | 387 |
| Belgium and Luxembourg | 716 | 201 | 151 | 353 |
| France | 3/ | 240 | - | - |
| Germany, West | ( 1 | ( 50 | - | - |
| Germany, East | ( | ( | - | - |
| Switzerland | - | 9 | - | - |
| Azores | 4/ 1 | 1 | - | - |
| Spain | - | 173 | - | - |
| ASIA: | | | | |
| Indonesia | - | - | 287 | - |
| AFRICA: | | | | |
| Egypt | 1 | - | - | - |
| Cameroon | - | 16 | - | - |
| French Equatorial Africa | - | 1 | - | - |
| French West Africa | 6/ 73 | 11 | - | - |
| Gold Coast | 46 | 5 | - | - |
| Nigeria | - | 4 | 9 | 13 |
| British West Africa | 1 | - | - | - |
| Liberia | - | 199 | 126 | 33 |
| Total Quantity | 3,019 | 1,726 | 2,260 | 1,829 |
| Total Value, 1,000 dollars | 609 | 595 | 1,060 | 717 |

See footnotes at end of circular.

UNITED STATES: Exports of total cigar leaf tobacco, calendar year 1953 with comparisons, by countries of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 73 | 355 | 305 | 598 |
| CENTRAL AMERICA: | | | | |
| Mexico | 3/ | 30 | 6 | 9 |
| Guatemala | - | 6 | - | 3/ |
| El Salvador | 3 | 3/ | 3/ | 3/ |
| Honduras | 3/ | 1 | - | 3/ |
| Nicaragua | 3/ | 24 | - | - |
| Panama, Republic of | 4 | 5 | - | - |
| Canal Zone | - | 1 | - | - |
| Bermuda | - | 3/ | 1 | - |
| Cuba | 3/ | 1 | - | - |
| Jamaica | 3/ | 7 | - | - |
| Haiti | - | 3 | 2 | 3 |
| Dominican Republic | 3/ | 1 | 55 | 14 |
| Leeward & Windward Islands | - | 1 | - | - |
| Trinidad and Tobago | - | 7 | - | - |
| Other British West Indies | 1 | - | - | - |
| SOUTH AMERICA: | | | | |
| Colombia | 1 | 11 | 2 | 9 |
| Venezuela | - | 3/ | 3/ | 1 |
| Surinam | - | 7 | 2 | 2 |
| French Guiana | 3 | - | - | - |
| Chile | 3/ | 4 | - | - |
| Brazil | 3/ | 66 | 88 | 124 |
| Paraguay | - | 1 | - | - |
| Uruguay | - | 1 | 1 | 2 |
| Argentina | 3/ | 40 | - | - |
| EUROPE: | | | | |
| Sweden | - | 308 | 121 | 45 |
| Norway | 1 | 28 | 2 | 2 |
| Denmark | - | 930 | 154 | 281 |
| United Kingdom | 134 | 55 | 3 | 15 |
| Ireland | - | 2 | - | - |
| Netherlands | 80 | 811 | 507 | 527 |
| Belgium and Luxembourg | 23 | 625 | 523 | 926 |
| France | 140 | 3/ | 2 | 16 |
| Germany, West | ( 339 | ( 4,451 | 4,040 | 2,817 |
| Germany, East | ( | ( | - | 1,305 |
| Austria | 2 | 344 | 157 | 178 |
| Czechoslovakia | - | 14 | - | - |
| Switzerland | - | 190 | 24 | 29 |
| Finland | - | 44 | - | - |
| U.S.S.R. | - | 12 | - | - |
| Azores | 4/ 1 | 4 | 3 | 4 |
| Spain | - | 22 | - | - |

Continued -

UNITED STATES: Exports of total cigar leaf tobacco, calendar year 1953 with comparisons by countries of destination (Con't)

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Portugal | - | 36 | - | - |
| Gibraltar | 3/ | 8 | 14 | 65 |
| Malta, Gozo, and Cyprus | - | 11 | - | - |
| Free Territory of Trieste | - | 9 | - | - |
| Yugoslavia | - | - | - | 18 |
| ASIA: | | | | |
| Israel and Palestine | - | 8 | 8 | 14 |
| India | - | 3 | 3 | 2 |
| French Indochina | - | 15 | 342 | 275 |
| Indonesia | 1 | - | - | - |
| Philippines, Republic of | 449 | 81 | 36 | 51 |
| China | - | 2 | - | - |
| Taiwan (Formosa) | - | - | - | 3 |
| Japan | 1 | - | - | - |
| OCEANIA: | | | | |
| Australia | 1 | 34 | 3 | 6 |
| New Zealand | 3/ | 2 | - | 2 |
| AFRICA: | | | | |
| French Morocco | - | 183 | - | - |
| Tangier | - | 6 | 3 | 8 |
| Algeria | ( 1 | 761 | 192 | 132 |
| Tunisia | ( | 84 | 60 | - |
| Egypt | 1 | 3/ | - | - |
| Canary Islands | 3/ | 47 | 49 | 39 |
| Spanish Africa | - | 2 | - | - |
| Cameroon | - | 13 | 53 | - |
| French Equatorial Africa | - | 3/ | - | 66 |
| French West Africa | 6/ 1 | 33 | - | - |
| Gold Coast | 1 | 1 | - | - |
| Nigeria | 1 | 6 | - | - |
| British West Africa | 2 | - | - | - |
| Madeira Islands | - | 1 | - | - |
| Angola | - | 1 | - | - |
| Western Portuguese Africa | 7/ 1 | 3 | - | - |
| Liberia | 1 | 8 | - | - |
| Mozambique | 3 | - | - | - |
| Union of South Africa | 3/ | 3/ | 1 | - |
| Total Quantity | 1,269 | 10/ 9,770 | 6,762 | 7,588 |
| Total Value, 1,000 dollars | 524 | 10,565 | 7,282 | 8,586 |

See footnotes at end of table.

UNITED STATES: Exports of cigar wrapper 8/ calendar year 1953
with comparisons by countries of destination

(Declared weight)

| Country of Destination | 1949-51 (average) | 1952 | 1953 1/ |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | |
| Canada | 281 | 140 | 390 |
| CENTRAL AMERICA: | | | |
| Mexico | 4 | 5 | 9 |
| Haiti | 3/ | 1 | 1 |
| Dominican Republic | 1 | 1 | 6 |
| SOUTH AMERICA: | | | |
| Colombia | 10 | 2 | 9 |
| Venezuela | 3/ | 3/ | 1 |
| Surinam | 2 | 1 | 2 |
| Brazil | 85 | 88 | 124 |
| Uruguay | 1 | 1 | 2 |
| Argentina | 2 | - | - |
| EUROPE: | | | |
| Sweden | 3/ | 5 | 25 |
| Norway | 2 | 2 | 2 |
| Denmark | 262 | 59 | 173 |
| United Kingdom | 3 | 2 | - |
| Netherlands | 118 | 172 | 194 |
| Belgium and Luxembourg | 98 | 158 | 407 |
| France | 3/ | 2 | 16 |
| Germany, West | ( 2,209 | 2,300 | 2,196 |
| Germany, East | ( | - | 143 |
| Austria | 121 | - | 36 |
| Czechoslovakia | 8 | - | - |
| Switzerland | 21 | 11 | 13 |
| U.S.S.R. | 19 | - | - |
| Azores | 3 | 3 | 4 |
| Gilbraltar | - | - | 7 |
| Free Territory of Trieste | 1 | - | - |
| ASIA: | | | |
| Israel and Palestine | 3/ | 3 | 6 |
| India | 2 | 3 | 2 |
| French Indochina | 7 | 2 | 3 |
| Philippines, Republic of | 52 | 36 | 51 |
| Taiwan (Formosa) | - | - | 3 |
| OCEANIA: | | | |
| Australia | 3 | - | - |
| New Zealand | - | - | 1 |
| AFRICA: | | | |
| Tangier | 5 | 3 | 8 |
| Algeria | 17 | 11 | 28 |
| Canary Islands | 34 | 49 | 39 |
| Spanish Africa | 3 | - | - |
| Union of South Africa | 3/ | 1 | - |
| Total Quantity | 3,374 | 3,061 | 3,901 |
| Total Value, 1,000 dollars | 6,117 | 4,474 | 5,812 |

See footnotes at end of circular.

UNITED STATES: Exports of cigar binder tobacco 8/ calendar year 1953, with comparisons, by countries of destination

(Declared weight)

| Country of Destination | 1949-51 (average) | 1952 | 1953 1/ |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | |
| Canada | 80 | 103 | 136 |
| CENTRAL AMERICA: | | | |
| Mexico | 12 | - | - |
| Guatemala | 8 | - | - |
| Honduras | 1 | - | - |
| Nicaragua | 9 | - | - |
| Panama, Republic of | 4 | - | - |
| Haiti | 4 | 3/ | 1 |
| Dominican Republic | - | 54 | 8 |
| Trinidad and Tobago | 4 | - | - |
| SOUTH AMERICA: | | | |
| Surinam | 7 | - | - |
| Brazil | 3 | - | - |
| EUROPE: | | | |
| Sweden | 78 | 116 | 20 |
| Norway | 11 | - | - |
| Denmark | 379 | 96 | 108 |
| United Kingdom | 28 | 1 | 15 |
| Netherlands | 569 | 335 | 333 |
| Belgium and Luxembourg | 436 | 333 | 504 |
| Germany, West | ( 2,745 | 1,629 | 614 |
| Germany, East | ( | - | 1,162 |
| Austria | 260 | 157 | 142 |
| Switzerland | 46 | 13 | 16 |
| Spain | 37 | - | - |
| Portugal | 32 | - | - |
| Malta, Gozo, and Cyprus | 15 | - | - |
| Italy | 1 | - | - |
| Free Territory of Trieste | 14 | - | - |
| Yugoslavia | - | - | 18 |
| ASIA: | | | |
| Israel and Palestine | 5 | 5 | 8 |
| French Indochina | 10 | 3 | 8 |
| China | 3 | - | - |
| OCEANIA: | | | |
| Australia | 10 | 3 | 6 |
| New Zealand | 4 | - | 1 |
| AFRICA: | | | |
| Algeria | 44 | - | - |
| Tunisia | 5 | - | - |
| Cameroon | 10 | - | - |
| French West Africa | 12 | - | - |
| Gold Coast | 1 | - | - |
| Angola | 2 | - | - |
| Western Portuguese Africa | 5 | - | - |
| Total Quantity | 4,894 | 2,848 | 3,100 |
| Total Value, 1,000 dollars | 4,722 | 2,500 | 2,599 |

See footnotes at end of circular.

UNITED STATES: Exports of cigar filler tobacco 8/ calendar year 1953, with comparisons by country of destination

(Declared weight)

| Country of Destination | 1949-51 (average) | 1952 | 1953 1/ |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | |
| Canada | 16 | 61 | 72 |
| CENTRAL AMERICA: | | | |
| Mexico | 2 | 1 | - |
| Bermuda | 3/ | 1 | - |
| Jamaica | 1 | - | - |
| Haiti | 2 | 1 | 1 |
| SOUTH AMERICA: | | | |
| Colombia | 4 | - | - |
| EUROPE: | | | |
| Norway | 4 | - | - |
| Denmark | 17 | - | - |
| Netherlands | 38 | 3/ | - |
| Belgium and Luxembourg | 124 | 32 | 15 |
| Germany, West | ( 1,965 | 112 | 7 |
| Germany, East | ( | - | - |
| Austria | 97 | - | - |
| Switzerland | 12 | - | - |
| Gilbraltar | 14 | 14 | 58 |
| ASIA: | | | |
| French Indochina | - | 337 | 264 |
| Philippines, Republic of | 66 | - | - |
| AFRICA: | | | |
| French Morocco | 226 | - | - |
| Algeria | 1,150 | 181 | 104 |
| Tunisia | 110 | 60 | - |
| Cameroon | 10 | 53 | - |
| French Equatorial Africa | - | - | 66 |
| French West Africa | 43 | - | - |
| Total Quantity | 3,901 | 853 | 587 |
| Total Value, 1,000 dollars | 1,322 | 309 | 175 |

See footnotes at end of circular.

### UNITED STATES: Exports of Perique tobacco calendar year 1953, with comparisons, by country of destination

(Declared weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 26 | 9 | - | 3 |
| SOUTH AMERICA: | | | | |
| Colombia | - | 1 | - | - |
| Argentina | 1 | - | - | - |
| EUROPE: | | | | |
| Sweden | 3/ | 5 | - | - |
| Norway | 13 | 17 | 11 | 20 |
| Denmark | 3/ | 1 | 2 | 4 |
| United Kingdom | 86 | 37 | 39 | 36 |
| Ireland | 1 | 3/ | 2 | - |
| Netherlands | 1 | 1 | - | 1 |
| Belgium and Luxembourg | 1 | 1 | - | - |
| Germany, West | ( 1 | ( 1 | - | - |
| Germany, East | ( | ( | - | - |
| Austria | - | 1 | - | - |
| Switzerland | 3/ | 5 | - | 2 |
| Finland | 2 | - | - | - |
| ASIA: | | | | |
| Japan | - | - | 6 | - |
| Total Quantity | 132 | 79 | 60 | 66 |
| Total Value, 1,000 dollars | 52 | 62 | 53 | 66 |

See footnotes at end of circular.

## UNITED STATES: Exports of Trimmings, stems, and scrap tobacco calendar year 1953, with comparisons by country of destination

(Declared Weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | |
| Canada | 1 | 3/ | 5 | 9 |
| CENTRAL AMERICA: | | | | |
| Mexico | 2 | - | - | - |
| Netherlands | 2 | - | - | - |
| Other British West Indes | 1 | - | - | - |
| SOUTH AMERICA: | | | | |
| Uruguay | - | 21 | 9 | 28 |
| EUROPE: | | | | |
| Sweden | 1,060 | 1,108 | 864 | 519 |
| Norway | 108 | 98 | 376 | 387 |
| Denmark | 201 | 316 | 198 | 244 |
| United Kingdom | 169 | 46 | - | 2 |
| Netherlands | 20 | 353 | 147 | 64 |
| Belgium and Luxembourg | 67 | 65 | 56 | 40 |
| France | 1 | - | - | - |
| Germany, West | ( 1,277 | ( 197 | 236 | 279 |
| Germany, East | ( | ( | - | - |
| Austria | - | 34 | - | - |
| Switzerland | 16 | 36 | 71 | 75 |
| Finland | 1 | - | - | - |
| Latvia | 2 | - | - | - |
| Poland and Danzig | 9 | - | - | - |
| Spain | 2 | 1 | - | - |
| Gibraltar | 3 | - | - | 40 |
| Malta, Gozo, and Cyprus | 2 | 3 | - | - |
| ASIA: | | | | |
| Israel and Palestine | - | 2 | - | - |
| Jordan | - | 38 | 144 | 58 |
| Kuwait | - | 10 | - | - |
| French Indochina | 2 | - | - | - |
| Indonesia | 10 | - | - | - |
| Macao | - | - | 20 | - |
| Philippines, Republic of | 203 | 120 | 111 | - |
| China | 15,180 | 4.623 | - | - |
| Kwantung | 774 | - | - | - |
| Hong Kong | 2 | 627 | 75 | 31 |
| Japan | 421 | - | - | - |

Continued -

UNITED STATES: Exports of Trimmings, stems, and scrap tobacco calendar year 1953, with comparisons by country of destination

(Declared Weight)

| Country of Destination | Averages 1935-39 | Averages 1947-51 | 1952 | 1953 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| AFRICA: | | | | |
| French Morocco | - | 134 | 453 | - |
| Tangier | - | 200 | 703 | 1,093 |
| Algeria | ( 6 | - | - | - |
| Tunisia | ( | - | - | - |
| Egypt | - | 5 | - | - |
| Canary Islands | 76 | 45 | 106 | 154 |
| Spanish Africa | 3/ | 34 | 48 | - |
| French West Africa | 6/ 9 | - | - | - |
| Madeira | - | - | - | 4 |
| Western Portuguese Africa | 7/ 5 | - | - | - |
| Total Quantity | 19,632 | 8,116 | 3.622 | 3,027 |
| Total Value, 1,000 dollars | 466 | 647 | 337 | 366 |

1/ Preliminary. 2/ Class established January 1952. 3/ Less than 500 pounds. 4/ Includes Madeira Islands for 1935-39. 5/ Does not include 1,313 thousand pounds to Kwantung which is included in grand total. 6/ Includes all French possessions in Africa n.e.i. 7/ Includes all Portuguese possessions in Africa n.e.i. 8/ Class breakdown established January 1949. 9/ West Germany. 10/ Includes 110 thousand pounds shipped to Germany in 1947 under Army Civilian Supply Program.

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT 14-54 April 23, 1954

# REVIEW OF 1953-54 TOBACCO PRODUCTION IN PUERTO RICO

The Caribbean Area Office of Agricultural Stabilization and Conservation Service reports that the 1953-54 tobacco crop as a whole is good, but thin in texture due to an abnormally wet growing season. The crop reportedly will contain less stained tobacco than the 1952-53 crop because planting of the "pantoja" variety has been restricted and the harvesting and curing season for the greater part of the crop has been favorable.

The 1953-54 crop should be very desirable from the cigar manufacturers' standpoint because of its thinness which will make it valuable for blending milder cigars. It also would produce more cigars per pound of tobacco.

Approximately twenty percent of the tobacco in the districts of Caguas, Barranquitas, Cayey, Aibonito, Juncos and San Lorenzo was injured because of the rainy harvesting and curing season. This was especially noticeable in the early harvesting of the lower leaves. All the late plantings, from the middle of the plant up, and all of the early plantings are very good quality tobaccos, thin in texture with excellent burning and smoking properties.

Tobacco in the districts of Utuado, Ciales, Naranjito and Orocovis had an ideal growing and harvesting season. It is thin in texture, burns well and is of excellent quality.

Approximately 85 percent of the crop is of very good quality. Twelve percent which is composed of the bottom leaves of the early harvest is poor quality, thin in texture, neutral in taste and contains a large percentage of immature, greenish tobacco. About three percent deteriorated in the field and was not worth harvesting.

It is estimated that approximately 41 thousand acres were planted in 1953-54. Production is estimated at 33,620,000 pounds of tobacco. The yield per acre is placed at 920 pounds, about 11 percent below the preceding year. The strippable leaf grade yield will decrease from 76 percent to 66 percent, the equivalent of six percent of the average overall value on a grade basis. Thus, if the tobacco sells at the same price per grade of last year the rate per acre would be about 17 percent below 1952-53.

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UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT 15-54 May 11, 1954

# DEVELOPMENTS IN THE TOBACCO INDUSTRY OF GREECE

## Production:

The official estimate of the 1953 tobacco crop is about 135 million pounds, 55 percent above the 1952 yield of 87 million pounds, and the second largest crop in the postwar period. The weather was favorable throughout the growing season. The acreage planted was 50 percent higher than in 1952 because of favorable prices and reduced stocks on hand. The same favorable prospects will probably lead to an increase in acres planted this spring but it is not expected to exceed a ten percent increase over 1953, according to a report from the American Embassy in Greece.

## Exports:

Total tobacco exports during 1953 were higher than in any post-war year. The 1953 total of 107 million pounds compares with 91 million in 1952, 69 million in 1951 and 56 million in 1950. Average price for 1953 exports was 15 percent lower than in 1952 due to the drachma devaluation of April 1953.

West Germany, the leading buyer of Greek tobacco in 1953, took about 32 percent of the total exports. The United States bought 13.3 million pounds (about 12 percent), and France bought 9.8 million pounds (8 percent). An interesting development in 1953 was the entrace of the Soviet trade bloc into the Greek export market. The block, which has bought very little tobacco from Greece since World War II, took 13.4 million pounds in 1953.

See table at the end of this Circular.

## Stocks:

Total marketable tobacco stocks of 1952 and older crops were 62.4 million pounds on December 31, 1953, down 46 percent from the same date in 1952. Of this total exportable stocks were about 51.8 million pounds: 42.5 million first quality and 9.3 million "Kappa," or second quality. The decrease in exportable stocks of tobacco has created much optimism about future business. It is expected that all of the exportable leaf of 1952 and prior crops will be moved by September 1, and that only 1953 tobacco will remain unmarketed.

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## Consumption:

Tobacco consumption in Greece during 1953 was 22.2 million pounds, 3.2 percent above 1952. This figure represents cigarette consumption. Very little tobacco is consumed in Greece in other forms.

In September 1953 special taxes, at a rate of 6.6 U. S. cents per pound on the popular B quality of cigarettes and 13 U. S. cents per pound on other qualities, were levied for the relief of the earthquake stricken Ionian islands. The rate of taxation is now 63.5 percent of the retail price of B quality rising to 65.5 percent on the luxury grade. Total revenue from all cigarette taxes equaled $28.7 million in 1953.

Cigarette consumption is expected to remain about the same in 1954 as in 1953.

## Outlook:

Devaluation of the drachma and the entry of the Soviet group into the market have increased the takings of export leaf considerably. Although the 1953 crop was large, stocks were reduced to little more than one-half of 1952 stocks. Indications are that this will encourage a ten percent rise in area planted in 1954.

The volume of 1954 export trade depends mainly on two questions. Will the increased German and Soviet bloc buying hold up? What action will the Turkish export trade take relative to the drachma devaluation? Internal production problems seem to be under control. The difficult problem of financing the tobacco trade will be helped substantially by the Bank of Greece's guarantee to supply approximately 40% of the funds needed. Present indications point to a good export trade in tobacco during 1954.

GREECE: Exports of leaf tobacco, by principal countries of destination, 1953 with comparisons

| Countries of Destination | 1951 | 1952 | 1953 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Western Germany | 17,299 | 41,083 | 34,778 |
| United States | 10,882 | 13,607 | 13,276 |
| France | 15,822 | 12,974 | 9,808 |
| Italy | 5,562 | 1,545 | 3,496 |
| Switzerland | 1,140 | 2,180 | 2,224 |
| United Kingdom | 1,605 | 2,061 | 3,847 |
| Egypt | 4,363 | 2,943 | 3,990 |
| Spain | – | – | 2,359 |
| Yugoslavia | – | – | 5,038 |
| Soviet Union | – | – | 4,658 |
| East Germany | – | – | 4,125 |
| Hungary | – | – | 4,257 |
| Poland | – | – | 440 |
| All Others | 12,712 | 14,871 | 15,341 |
| Total | 69,385 | 91,264 | 107,637 |

# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT 16-54 May 18, 1954

## MISCELLANEOUS WORLD TOBACCO TRADE DEVELOPMENTS

### Government of India to send Trade Delegation to Russia and Eastern European Countries

It has been reported that the Government of India is sending a trade delegation to Russia and other eastern European countries to find markets for the accumulated stock of flue-cured tobacco in Guntur district, Andhra State, estimated at over 30,000,000 pounds. Meanwhile, the Andhra Government, on the recommendations of M.P. Pai, Member of the Andhra Revenue Board, is reported to have decided to lift, effective May 1, 1954, the restrictions prevailing thus far on tobacco sales by private dealers near auction centers.

### Argentina's Flue-Cured Acreage Up

Argentina's flue-cured plantings for the 1954 harvest, which is currently under way, were much larger than in the last two years, according to a report from the American Embassy at Buenos Aires. Plantings for the 1953-54 season amounted to 20,400 acres, compared with 16,700 in 1952-53, and 14,300 in 1951-52. Burley plantings were increased to 1,400 acres for 1953-54. The acreage planted to native dark tobaccos dropped about 20 percent between 1951-52 and 1953-54.

### New Zealand Tobacco Imports and Production of Leaf Tobacco and Cigarettes Decline Slightly

New Zealand imported 5.1 million pounds of leaf tobacco, practically all from the United States, in 1953. This compares with imports of 6.8 million pounds in 1952 and a 1947-51 average of 5.4 million pounds.

Production of cigarettes in 1953 (4.9 million pounds) was about two percent below the preceding year, but nearly thirty percent above the 1947-51 average. Output of other tobacco products, largely smoking tobacco, at 5.7 million pounds was six percent above that of the preceding year. In 1953, as in previous years, imported tobacco continued to comprise above sixty percent of the total leaf tobacco released from bond to manufacturers.

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New Zealand's 1954 tobacco harvest has been tentatively estimated at five million pounds by the New Zealand Tobacco Board. Production in 1953 amounted to 4.8 million pounds, practically all of which was of the flue-cured type.

The area suitable for growing tobacco in New Zealand is limited and the acreage devoted to it has declined in recent years. If production is stabilized near current levels, import requirements of tobacco may tend to increase during the next few years.

## Subsidy Boosts Colombia's Leaf Exports

Colombia's leaf tobacco exports (mostly dark and cigar types) increased from 7.0 million pounds in 1952 to 11.1 million in 1953, due largely to a subsidy extended to exporters beginning late in 1952. Exporters received a premium of about 40 percent of the price paid by the foreign purchaser. Prices to foreign buyers on January 1, 1954, ranged from 20 U.S. cents to 44 U. S. cents per pound according to quality. Use of this subsidy raised prices to domestic purchasers but held the price steady to foreign customers, with only minor exceptions.

COLOMBIA: Exports of Leaf Tobacco

| Country of Destination | 1951 | 1952 | 1953 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Germany | 6,317 | 5,523 | 7,031 |
| France | 659 | 1,220 | 1,971 |
| Algeria | 847 | 66 | 170 |
| Indonesia | 88 | - | - |
| Indochina | 110 | - | 805 |
| French Morocco | 231 | - | 242 |
| Netherlands | 495 | 127 | 721 |
| All Others | 376 | 99 | 138 |
| Total | 9,126 | 7,037 | 11,081 |

The German cigar industry continues to be the major outlet for Colombia's export tobaccos. France ranks second in amount of leaf taken. Considerable quantities shipped direct to France are re-exported to French possessions in North Africa and to Indochina. Latest reports indicate that in recent weeks a sizable amount is being purchased by the French.

There are large stocks available for export, and with the help of the subsidy, this should result in a high level of shipments abroad during 1954. A new area of production has been opened in the Magdalena district due to the subsidy policy. This area, while starting slow, shows promise of adding greatly to the leaf available for export. Continuation of the subsidy is to be expected due to its apparent success, according to the American Embassy.

## Brazilian Tobacco Developments

Exports of leaf and twist tobacco from Brazil in the first eleven months of 1953 (latest statistics available) amounted to 46.6 million pounds, valued at U.S. $20.1 million at the official export rate. This compares with exports of 66.4 million pounds valued at U.S. $19.0 for the calendar year 1952. Exports of twist tobacco totaled about 2 million pounds in 1953. Practically all of it went to Uruguay.

There was a sharp drop in the exports to Germany, Spain, Denmark, Belgium-Luxembourg and Switzerland. Those to Germany fell from 19 million pounds in 1952 to only 10 million in the eleven months of 1953. Those to Spain dropped from 12 million to 6.7 million. On the other hand exports to France rose from about 3,000 to over 3 million.

Imports of tobacco into Brazil (150,000 pounds in the first eleven months of 1953) consisted almost entirely of cigar wrapper from the United States.

The Consulate estimates that about 198.4 million pounds of tobacco were consumed in Brazil in 1953 as compared with 185.2 million pounds in 1952. Official estimates have not been released to date. According to the trade, one of the reasons for the increase in consumption in tobacco is a noticeable increase in smoking by women.

The 1953-54 Brazilian tobacco crop is tentatively estimated at 277.8 million pounds, or approximately five percent above the previous year by the Consulate at Porto Alegre.

Attractive prices and favorable weather, especially in Bahia where a substantial increase in production is reported, account for most of the increased acreage in production anticipated. The 1953-54 production (year ending April 1954) includes an estimated 56.2 million pounds of flue-cured, 123.8 million pounds of air-cured and 97.8 million pounds of twist tobacco.

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FT 17-54 May 24, 1954

# WORLD TOBACCO TRADE INCREASES IN 1953

World exports of unmanufactured tobacco during 1953, totaled 1,282 million pounds, about 10 percent above 1952 and the third highest of record in the postwar period. The postwar record was set in 1951 when world exports reached 1,304 million pounds. The 1953 total was 23 percent above the 1935-39 average for comparable countries; Bulgaria, Czechoslovakia, Poland and China being excluded, since 1953 data are not available from these countries.

Principal Exporting Countries: The U. S. continued as the world's leading tobacco exporter in 1953. Its exports totaled 516,357,000 pounds, 30 percent above 1952, and comprised about 40 percent of the world total as compared to about 34 percent in 1952. Other countries whose exports rose, included Greece, Italy, Netherlands, Turkey, Indonesia, Algeria, Nyasaland, the Union of South Africa and Colombia.

The principal countries whose exports declined in 1953 as compared to 1952, included Canada, Cuba, Yugoslavia, Syria, India, Brazil, Madagascar and Southern Rhodesia.

Flue-cured leaf accounted for 441,998,000 pounds or 85 percent of total 1953 U. S. exports, compared with 319,270,000 pounds or 80.5 percent in 1952. Burley exports from the United States in 1953 totaled 25,007,000 pounds, 5 percent of the total, compared with 26,871,000 pounds or about 6 percent of the total in 1952. Exports of fire-cured leaf amounted to 23,761,000 pounds in 1953 compared with 26,612,000 pounds in 1952.

Exports from all Latin American tobacco-exporting countries combined were somewhat lower in 1953 than 1952, as increases reported for Honduras, Colombia and Paraguay were more than offset by falling shipments from the Dominican Republic, Cuba and Brazil.

The oriental-type tobacco producing countries of southeast Europe and the Near East exported 11 percent more tobacco in 1953 than in the preceding year. Exports from Greece rose to a postwar high of 107,860,000 pounds, while Turkey's 1953 exports, 147,901,000 pounds, have been exceeded only once since World War II. On the other hand, Yugoslavia exports in 1953, 13,631,000 pounds, were about 27 percent below 1952.

Unmanufactured tobacco exports from Far Eastern countries as a group dropped 7 percent from 1952 and were about 30 percent below prewar. Indonesian exports were 18 percent above 1952 but still 67 percent below 1935-39 prewar average. India's exports in 1953 totaled 68,076,000 pounds or 18 percent below 1952, but were 44 percent above the 1935-39 prewar average. Japan and the Philippine Republic are still far below the prewar average.

Principal Importing Countries: Several important importing countries showed substantial increases in imports of unmanufactured tobacco in 1953 as compared with the previous year. The United Kingdom, Italy and Germany increased imports substantially and lesser increases were reported by Sweden, Australia, French Indochina, the United States and a number of other countries. Significant declines in imports were reported by France, Spain, the Philippines, Japan, Denmark, Egypt and Ceylon.

The United Kingdom continued as the world's leading tobacco importer in 1953. Its imports totaled 315,770,000 pounds, 41 percent above 1952 when purchases from the United States were sharply curtailed in an effort to conserve scarce dollar exchange. From 1945 to 1951 the United Kingdom imported an average of about 334,000,000 pounds of unmanufactured tobacco from all sources. Imports of United States leaf by the United Kingdom accounted for 55 percent of the country's 1953 total imports compared with but 30 percent in 1952.

Western Germany, the second most important tobacco importer in the world, imported 122,770,000 pounds of tobacco in 1953, 9 percent more than in 1952 and more than in any other postwar year. The United States, the third most important importing country, took 105,428,000 pounds in 1953, 2 percent above 1952 and an all-time record.

Exports for the countries listed in the accompanying table are consistently above imports for a number of reasons, including, (1) reexports, which are included in the export statistics for a number of countries, have not been shown as imports in some countries, (2) a number of countries, whose trade is small and whose imports materiallyexceed exports are omitted from the tables and (3) imports into the Soviet Union are not shown because data are not available.

# TOBACCO, UNMANUFACTURED: International Trade, Averages 1935-39, 1945-49, Annual 1950-53

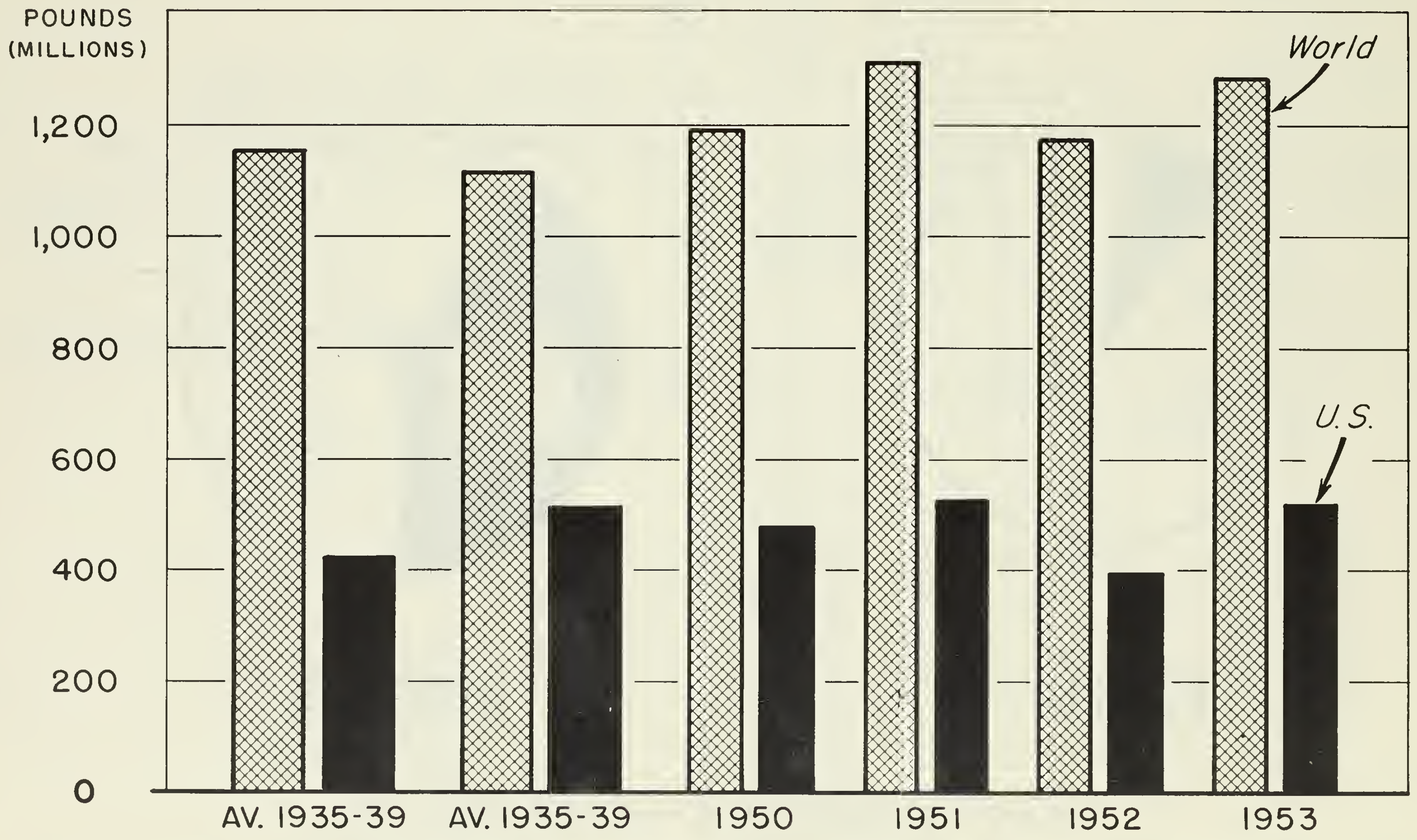
| | Average 1935-39 | | Average 1945-49 | | 1950 | | 1951 | | 1952 | | 1953 1/ | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Exports | Imports | Exports | Imports | Exports | Imports | Exports | Imports | Exports | Imports | Exports | Imports |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 15,294 | 4,317 | 17,052 | 1,626 | 22,933 | 1,322 | 29,422 | 1,152 | 38,315 | 1,677 | 28,389 | 1,497 |
| Costa Rica | - | 40 | 2/ 72 | 88 | - | 80 | - | 88 | - | 100 | - | 3/ 100 |
| El Salvador | 23 | 495 | - | 2,201 | - | 2,487 | - | 3,402 | 9 | 3,078 | - | 3/ 3,000 |
| Guatemala | - | 68 | - | 333 | - | 423 | - | 751 | - | 757 | - | 713 |
| Honduras | 1894 | 43 | 3,851 | 52 | 7,015 | 4/ 125 | 3,930 | 146 | 3,217 | 161 | 4,161 | 171 |
| Mexico | 215 | 210 | 497 | 1,857 | 608 | 2,736 | 656 | 1,833 | 361 | 3,602 | 548 | 3,320 |
| Nicaragua | - | 175 | - | 488 | - | 651 | - | 613 | - | 600 | - | 3/ 600 |
| United States | 429,797 | 71,274 | 513,579 | 84,136 | 477,596 | 90,031 | 522,089 | 104,652 | 396,279 | 103,056 | 516,357 | 105,428 |
| Cuba | 27,712 | - | 32,649 | - | 31,818 | - | 43,397 | - | 45,733 | - | 4/ 37,156 | - |
| Dominican Republic | 13,652 | - | 38,524 | 2/ 122 | 31,910 | - | 35,257 | - | 33,609 | - | 20,867 | - |
| Total North America | 479,587 | 76,622 | 606,224 | 90,903 | 571,880 | 97,855 | 634,751 | 112,637 | 517,523 | 113,031 | 607,478 | 114,829 |
| EUROPE: | | | | | | | | | | | | |
| Austria | 2/ 1,424 | 2/ 16,954 | - | 2/ 13,542 | 2,543 | 17,397 | 372 | 21,138 | 513 | 21,439 | 1,075 | 22,761 |
| Belgium and Luxembourg | 6/ 413 | 40,695 | 6/ 2/ 485 | 33,892 | 6/ 95 | 47,311 | 6/ 5,933 | 54,268 | 6/ 540 | 47,229 | 6/ 267 | 47,106 |
| Bulgaria | 59,396 | - | 2/ 55,246 | - | 3/ 20,000 | - | 5/ | - | 5/ | - | 5/ | - |
| Czechoslovakia | - | 2/ 20,768 | - | 2/ 26,460 | - | 3/ 20,000 | - | 5/ | - | 5/ | - | 5/ |
| Denmark | 490 | 20,206 | 2/ 695 | 19,347 | 1,158 | 30,464 | 765 | 22,171 | 46 | 22,183 | 4/ 147 | 4/ 19,218 |
| Ireland | 7/ 394 | 2/ 12,292 | - | 16,090 | - | 19,729 | - | 18,579 | 6/ 1,258 | 16,227 | 6/ 1,762 | 17,252 |
| Finland | - | 7,754 | - | 6,707 | - | 9,415 | - | 10,169 | - | 10,740 | - | 10,432 |
| France | 2/ 686 | 2/ 61,576 | 577 | 63,001 | 145 | 46,097 | 137 | 69,725 | 1,457 | 73,230 | 3,187 | 62,185 |
| Germany | 2/ 19 | 2/ 204,644 | - | 2/ 26,460 | 8/ 104 | 8/ 98,978 | 8/ 783 | 8/ 101,919 | 8/ 1,171 | 8/ 112,523 | 8/ 564 | 8/ 122,770 |
| Greece | 97,657 | 20 | 32,440 | - | 56,669 | - | 69,385 | - | 91,264 | - | 107,860 | - |
| Hungary | 19,162 | 3,106 | 2/ 840 | - | 5/ | 5/ | 5/ | 5/ | 5/ | 5/ | 5/ | 5/ |
| Italy | 12,927 | 5,253 | 2/ 5,775 | 2/ 16,578 | 20,897 | 9,056 | 17,320 | 5,560 | 17,344 | 4,317 | 24,210 | 22,643 |
| Netherlands | 6/ 3,249 | 67,349 | 6/ 2/ 2,080 | 46,721 | 6/ 3,446 | 63,790 | 6/ 4,839 | 61,628 | 6/ 10,258 | 56,995 | 6/ 11,986 | 70,964 |
| Norway | - | 6,602 | - | 8,809 | - | 8,225 | - | 8,351 | - | 8,982 | - | 4/ 9,000 |
| Poland | 2/ 149 | 2/ 18,404 | - | 2/ 5,595 | - | 5/ | - | 5/ | - | 5/ | - | 5/ |
| Portugal | - | 6,381 | - | 10,024 | - | 10,381 | - | 10,483 | - | 10,694 | - | 10,761 |
| Spain | - | 3/ 30,979 | - | 38,746 | - | 55,600 | - | 46,383 | - | 55,948 | - | 4/ 44,826 |
| Sweden | 153 | 14,829 | 2/ 1,194 | 15,962 | - | 18,874 | - | 26,076 | - | 19,226 | - | 22,586 |
| Switzerland | - | 15,795 | - | 20,424 | - | 22,760 | - | 23,433 | - | 24,680 | - | 25,540 |
| United Kingdom | 6/ 5,996 | 258,486 | 6/ 4,699 | 335,348 | - | 305,805 | - | 354,878 | - | 223,718 | - | 315,770 |
| Yugoslavia | 10,288 | 8,010 | 17,867 | - | 17,278 | 1,397 | 13,832 | 11,433 | 18,475 | - | 13,631 | 1,554 |
| Total Europe | 212,403 | 820,103 | 121,898 | 704,206 | 122,335 | 785,779 | 113,366 | 846,694 | 142,326 | 708,131 | 164,689 | 825,368 |
| ASIA: | | | | | | | | | | | | |
| Lebanon | 9/ 2,762 | 9/ 112 | 9/ 4,987 | 9/ 768 | 1,173 | 538 | 807 | 1,086 | 849 | 693 | 728 | 965 |
| Syria | | | | | 5,439 | 1,349 | 8,314 | 619 | 6,385 | 906 | 4/ 2,640 | 4/ 1,108 |
| Turkey | 78,054 | 152 | 105,371 | - | 110,732 | - | 127,328 | - | 125,964 | - | 147,901 | - |
| Ceylon | 2,086 | 1,200 | 875 | 1,831 | 1,363 | 1,625 | 1,007 | 1,927 | 1,182 | 2,163 | 786 | 1,886 |
| China | 30,994 | 56,613 | 3/ 1,209 | 3/ 24,647 | 5/ | 5/ | 5/ | 5/ | 5/ | 5/ | 5/ | 5/ |
| French Indochina | 2/ 216 | 2,718 | - | 4,937 | - | 11,678 | - | 12,377 | - | 16,867 | - | 3/ 19,746 |
| Hong Kong | 5/ | 10,450 | 6/ 1,180 | 7,230 | 6/ 6,052 | 9,491 | 6/ 37,470 | 25,276 | 6/ 1,672 | 6,106 | 6/ 2,673 | 8,051 |
| India | 43,500 | 4,791 | 55,445 | 11,262 | 88,533 | 8,382 | 109,441 | 5,848 | 82,881 | 5,831 | 4/ 68,076 | 4/ 3,102 |
| Japan | 14,700 | 5,458 | 2/ 450 | - | 884 | 2,977 | 1,530 | 3,649 | 2,204 | 22,333 | 1,165 | 16,197 |
| Indonesia | 101,176 | 2,765 | 2/ 5,970 | 2/ 4,797 | 28,111 | 8,860 | 28,472 | 14,588 | 28,195 | 17,538 | 33,254 | 16,182 |
| Philippine Republic | 37,357 | 1,075 | 2/ 7,817 | 2/ 277 | 8,137 | 28,792 | 13,856 | 9,871 | 26,132 | 32,542 | 26,315 | 25,468 |
| Thailand (Siam) | 3 | 3,405 | - | 1,745 | - | 2,926 | - | 1,697 | - | 6,177 | - | 5,000 |
| Total Asia | 310,858 | 88,739 | 183,304 | 57,494 | 250,424 | 76,618 | 328,225 | 76,938 | 275,464 | 111,156 | 283,538 | 97,705 |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **SOUTH AMERICA:** | | | | | | | | | | | | |
| Argentina | 180 | 16,878 | 4,042 | 18,322 | - | - | - | 5,853 | - | 763 | 992 | - |
| Brazil | 71,955 | 772 | 77,151 | 408 | 80,850 | 234 | 65,726 | 317 | 67,227 | 271 | 52,633 | 150 |
| British Guiana | - | 2/ 393 | - | 614 | - | 643 | - | 545 | - | 591 | - | 5/ |
| Chile | - | 172 | - | 827 | - | 737 | - | 752 | - | 650 | - | 4/ 347 |
| Colombia | 6,472 | 2/ 138 | 6,261 | 350 | 7,983 | 521 | 9,127 | 740 | 6,993 | 4/ 4 | 11,081 | 4/ 10 |
| Paraguay | 7,747 | 202 | 10,676 | - | 7,612 | - | 5,886 | 105 | 9,513 | - | 11,023 | - |
| Peru | - | 212 | - | 561 | - | 843 | - | 956 | - | 277 | - | 496 |
| Surinam | - | - | - | 192 | - | 104 | - | 105 | - | - | - | - |
| Uruguay | - | 3,051 | - | 6,103 | - | 9,261 | - | 10,719 | - | 7,685 | - | 8,964 |
| Total South America | 86,354 | 21,818 | 98,130 | 27,377 | 96,445 | 12,343 | 80,739 | 20,092 | 83,733 | 10,241 | 75,729 | 9,967 |
| **AFRICA:** | | | | | | | | | | | | |
| Algeria | 24,979 | 7,482 | 14,637 | 6,517 | 23,677 | 8,512 | 29,870 | 9,489 | 23,631 | 9,932 | 27,774 | 9,903 |
| French Morocco | - | 2/ 3,921 | 2/ 2,543 | 4,969 | - | 5,426 | 68 | 3,856 | 22 | 4,259 | 295 | 5,366 |
| Belgian Congo | - | 3/ 1,000 | 118 | 2/ 3,130 | - | 3,137 | - | 6,142 | - | 5,258 | - | 5/ |
| Nyasaland | 12,810 | - | 20,950 | 2/ 15 | 23,758 | 10 | 27,000 | 5 | 20,539 | - | 26,255 | - |
| Egypt | - | 13,014 | - | 26,418 | - | 28,346 | - | 27,910 | - | 26,402 | - | 24,241 |
| Gold Coast | - | 1,471 | - | 1,397 | - | 1,341 | - | 1,654 | - | 1,799 | - | 4/ 1,608 |
| Madagascar | 5,262 | 17 | 3,676 | - | 6,285 | 66 | 9,594 | 44 | 7,600 | - | 765 | - |
| Northern Rhodesia | 1,429 | - | 4,151 | - | 6,175 | - | 10,467 | - | 9,033 | - | 10,473 | - |
| Southern Rhodesia | 19,166 | 327 | 52,811 | 2/ 1,292 | 89,315 | 6,756 | 67,433 | 9,213 | 88,361 | 7,759 | 80,712 | 5/ |
| Tunisia | - | 2/ 2,843 | - | 2/ 5,957 | 11 | 5,811 | 11 | 4,888 | 11 | 4,956 | 155 | 6,158 |
| Union of South Africa | 635 | 3,100 | 1,084 | 4,476 | 2,091 | 4,271 | 2,891 | 4,536 | 2,068 | 2,528 | 4,446 | 2,046 |
| Total Africa | 64,281 | 33,175 | 99,970 | 54,171 | 151,312 | 63,676 | 147,334 | 67,737 | 151,265 | 62,893 | 150,875 | 49,322 |
| **OCEANIA:** | | | | | | | | | | | | |
| Australia | 114 | 21,537 | 79 | 24,391 | 1 | 25,799 | 2 | 24,728 | - | 32,133 | - | 35,520 |
| New Zealand | 113 | 3,027 | - | 5,738 | - | 5,629 | - | 6,524 | - | 6,764 | - | 4/ 6,841 |
| Total Oceania | 227 | 24,564 | 79 | 30,129 | 1 | 31,428 | 2 | 31,252 | - | 38,897 | - | 42,361 |
| TOTAL FOR COMPARABLE COUNTRIES, EXCLUDING BULGARIA, CZECHOSLOVAKIA, POLAND, HUNGARY, CHINA: | 1,044,009 | 966,130 | 1,052,310 | 907,578 | 1,172,397 | 1,047,699 | 1,304,417 | 1,155,350 | 1,170,311 | 1,044,349 | 1,282,309 | 1,139,552 |
| TOTAL FOR ALL COUNTRIES SHOWN: | 1,153,710 | 1,065,021 | 1,109,605 | 964,280 | 1,192,397 | 1,067,699 | 1,304,417 | 1,155,350 | 1,170,311 | 1,044,349 | 1,282,309 | 1,139,552 |

1/ Preliminary. 2/ Less than a 5-year average. 3/ Approximated from unofficial information. 4/ Estimated on the basis of data available for 6 months or more of the year. 5/ Not available. 6/ Re-exports.
7/ Includes manufactured tobacco. 8/ Western Germany only. 9/ Separate data not available.

Source: Foreign Agricultural Service. Prepared or estimated from official statistics of foreign governments, reports of United States Foreign Service Officers and other information.

# TOBACCO: TOTAL WORLD AND UNITED STATES EXPORTS



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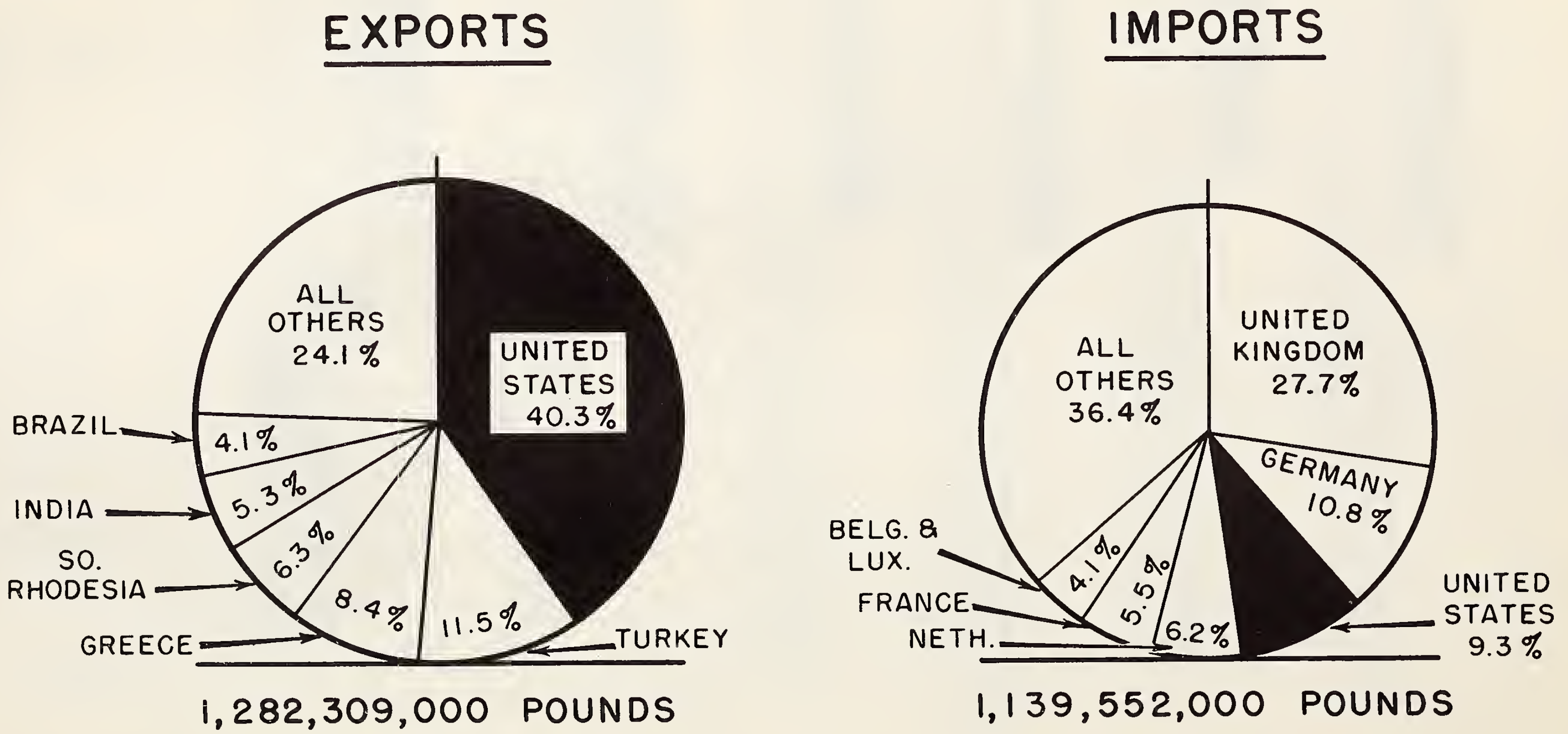
# TOBACCO: PERCENTAGE OF TOTAL EXPORTS AND IMPORTS BY SPECIFIED COUNTRIES, 1953



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UNITED STATES DEPARTMENT OF AGRICULTURE
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WASHINGTON, D.C.

FT 18-54 May 28, 1954

## EXPORTS OF TOBACCO AND MANUFACTURES TO HONG KONG

## PLACED UNDER GENERAL LICENSE

The Bureau of Foreign Commerce, Department of Commerce, which administers foreign trade controls announced May 20 a relaxation of controls on exports of tobacco and manufactures and about 100 other non-strategic commodities, including cigarette paper, to Hong Kong.

As of that date it will no longer be necessary to get individual licenses for shipments of those commodities to Hong Kong. Specific licenses previously were necessary. Shippers now should indicate on their export declaration that the export is being made under General License G.H.K.

There has been no change in the ban on shipments of tobacco and all other commodities to the mainland of China.

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May 24, 1954

## THE MARKET FOR UNITED STATES TOBACCO IN PORTUGAL

### Portugal's Imports from the United States up Slightly in 1953

Portugal's imports of U. S. tobacco in 1953 totaled 7.9 million pounds, 2 percent higher than in 1952 but 6 percent below the postwar (1946-52) average according to a report from the American Embassy at Lisbon. The United States accounted for 73 percent of Portugal's total imports of unmanufactured tobacco last year. This was the same as the prewar percentage but substantially below that of the early postwar years when 85 percent of Portugal's tobacco came from this country.

Table 1.- Portugal: Imports of Unmanufactured Tobacco, by Sources, Averages 1935-39 and 1946-50, Annual 1951-53

| Year | United States | Angola | Turkey & Greece | All Others | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Average: | | | | | |
| 1935-39 | 4,702 | 873 | 5 | 802 | 6,382 |
| 1946-50 | 8,748 | 945 | 183 | 467 | 10,343 |
| 1951 | 7,906 | 893 | 1,115 | 569 | 10,483 |
| 1952 | 7,759 | 804 | 1,357 | 774 | 10,694 |
| 1953 | 7,903 | 780 | 1,437 | 641 | 10,761 |

Imports from Turkey and Greece continued to rise in 1953. They totaled over 1.4 million pounds and comprised over 13 percent of total imports. Portugal took only minor amounts of oriental tobacco prior to 1951. Imports from Angola and all other sources last year were somewhat below 1952.

In addition to unmanufactured tobacco, Portugal imports small quantities of cigarettes, cigars and cigarillos, and cut tobacco. Cigarette imports, principally American and British brands, comprise about 3/4 of the total imports of tobacco products. Exports of tobacco products are insignificant.

### United States Tobacco Faces Increased Competition

United States tobacco faces increased competition in Portugal from tobacco produced in Portuguese Africa and in Eastern Mediterranean countries, particularly Greece and Turkey.

To expedite and encourage tobacco production in the African provinces, the Portuguese Ministeries of Finance and Overseas issued Decree No. 39,570 dated March 18, 1954, putting into effect a new 15 percent duty preference on light and semi-light tobaccos originating in Portugal's overseas provinces. The present duty on leaf tobacco imported from non-Portuguese possessions is approximately eight cents per pound plus 60 percent ad valorem. Should the new 15 percent preference prove to be insufficient to encourage production, requests for further increases in the rate of preference are anticipated. The Embassy reports, however, that limited production, especially of clear leaf, and requirements of cigarette factories in the provinces probably will keep quantities available for export to Portugal far below the effective demand.

It is reported that Portugal has been under pressure to increase its purchases of Greek tobacco. In the negotiations leading to the extension of the Greek-Portuguese trade agreement early this year, the Greeks are said to have pointed out that Portuguese imports of Greek tobaccos had been falling far short of the $700,000 annual quota established in the basic agreement of 1949. The Greek delegation is quoted as having urged Portugal not only to increase the percentage of oriental tobacco in its cigarettes but to use more better-grade Greek tobacco. The Portuguese are for the most part buying inexpensive non-aromatic leaf from Greece for blending with Virginia tobacco in low-priced cigarettes. Imports of better-quality oriental tobaccos from Greece are relatively small and are unlikely to increase.

## Output of Most Tobacco Products Down Moderately in 1953

The output of tobacco products other than cigars, which are of minor importance, was off slightly in 1953. Output of cigarettes, which had risen steadily from 6.7 million pounds in 1949 to 8.0 million in 1952, fell off by a fraction of one percent. Cut tobacco production was off 10 percent to 2.7 million pounds. Output of cigars and snuff totaled 18,000 pounds. This represented a doubling of cigar production but a 10 percent drop in snuff production.

The decline in output of tobacco products is attributed to a poor trade and agricultural situation. Production of tobacco products in Portugal is limited to two manufacturers operating under Government franchises.

Table 2.- Portugal: Output of Tobacco Products, 1949-53

| Year | Cigarettes | Cut Tobacco | Cigars | Snuff | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1949 | 6,715 | 3,430 | 15 | 26 | 10,186 |
| 1950 | 6,832 | 2,996 | 4 | 22 | 9,854 |
| 1951 | 7,152 | 3,000 | 4 | 9 | 10,178 |
| 1952 | 7,961 | 3,062 | 9 | 20 | 11,052 |
| 1953 | 7,948 | 2,745 | 18 | 18 | 10,729 |

Retail prices of Portuguese tobacco products, which are fixed by law, were the same in both 1952 and 1953. Cigarettes are sold at prices ranging from about 8.36 U. S. cents per package of 24 for dark-type cigarettes, to 17.4 U. S. cents per package of 20 for the better-quality U. S. blended-type. Prices for smoking mixtures range from about $1.85 per pound to $2.10 per pound, the higher priced mixtures being made almost exclusively from U. S. leaf. Cigar prices vary substantially but average around 5.3 cents each.

## Outlook for United States Exports

Efforts to expand the production of Virginia and Burley types of tobacco in Portuguese overseas provinces might have an adverse effect on imports from the U. S. However, consumer preference for products containing U. S. tobacco is strong, and Portuguese manufacturers have made only moderate shifts from U. S. leaf to oriental and other tobaccos. Imports of U. S. cigarette leaf should be well-maintained, at least, for the immediate future.

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FT 20-54 June 4, 1954

# TOBACCO PRODUCTION IN TURKEY AT AN ALL TIME HIGH 1/

## Tobacco Production at a Record Level

Production of tobacco in Turkey reached a new high in 1953 of 250.2 million pounds, compared with the previous high of 220.5 million pounds in 1947. Production in Turkey has been increasing very rapidly since 1945. The acreage has increased about 100,000 acres since 1951 as the result of favorable market prices which enabled producers and merchants to dispose of practically all marketable stocks since 1951. Stocks of Turkish leaf tobacco have declined steadily since 1952. Estimated stocks of manipulated tobacco on hand for manufacture and sale as of January 1, 1954 were only 32.6 million pounds compared with 44.1 million pounds a year ago.

Turkey: Domestic Acreage, Production and Consumption of Tobacco

| Year | Acreage | Production | Consumption |
|---|---|---|---|
| | 1,000 acres | Million Pounds | Million Pounds |
| 1935-39 Av. | 194.0 | 128.5 | 28.7 |
| 1947-51 Av. | 304.3 | 193.1 | 41.5 |
| 1951 | 300.0 | 195.4 | 41.0 |
| 1952 | 319.1 | 202.7 | 43.3 |
| 1953 | 400.1 | 250.2 | 50.7 |

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## Domestic Manufacture

The net weight of tobacco used for domestic manufacture in 1953 was 50.7 million pounds compared with 43.3 pounds in 1952 and a prewar (1935-39) annual average of 28.7 million pounds. Cigarettes are the leading manufactured product, but smoking tobacco and small quantities of cigars and snuff are also produced.

## Exports of Leaf Tobacco

During the postwar years the United States has been the principal buyer of Turkish tobacco. In 1953, the United States took 63.3 million pounds, which was about 46 percent of Turkey's total leaf exports in contrast to 56 percent in 1951. Western Germany is Turkey's second largest outlet for leaf tobacco. Smaller but important shipments are made to other European countries for use in American blended-type and oriental cigarettes.

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1/ Based on a report submitted by Arthur W. Purcell, Vice Consul, American Embassy, Izmir, Turkey.

Turkey: Exports of Leaf Tobacco by Country of Destination

| Country | 1951 | 1952 | 1953 1/ |
|---|---|---|---|
| | Million Pounds | Million Pounds | Million Pounds |
| United States | 69.7 | 51.7 | 68.3 |
| Western Germany | 9.7 | 20.8 | 22.6 |
| United Kingdom | 3.1 | 3.7 | 10.4 |
| Soviet Union | 3.7 | 5.8 | - |
| Belgium | 3.8 | 5.5 | 5.4 |
| France | 6.7 | 2.3 | 4.4 |
| Italy | 1.7 | 3.2 | 7.0 |
| Egypt | 8.0 | 4.5 | 5.1 |
| Others | 17.5 | 25.7 | 24.7 |
| TOTAL | 123.9 | 123.2 | 147.9 |

1/ Preliminary. Based on the Turkish Tobacco Growers Union report of exports by country of destination for the ports of Izmir and Istanbul which totaled 147.9 million pounds. The Turkish Foreign Commerce, which does not report exports by destination, reported that 155.9 million pounds of leaf tobacco were exported during 1953.

Turkey's leaf tobacco exports have increased substantially from prewar due to an almost world-wide shift in consumer preference for American blended-type cigarettes, which contain oriental tobacco. Exports of leaf tobacco during 1953 totaled 155.9 million pounds compared to the record high of 171 million pounds exported in 1949. Turkish exports of leaf tobacco during 1949 were exceptionally large because of the reopening of the Western European market.

Prices paid by United States buyers for tobacco during 1953 for the 1951 and 1952 Aegean crop averaged about 59.9 and 62.1 cents per pound, f.o.b. Izmir. Prices paid for the 1951 and 1952 Black Sea crop averaged about 89.8 and 97.5 cents per pound. United States buyers paid 31.9 and 16.5 cents per pound respectively for the 1952 Kappa and Double Kappa crop. Western European buyers paid from 25.1 to 67.0 cents per pound for the 1952 Kappa and American Grade crop. Hungarian and Czechoslovakian buyers paid from 20.1 to 64.9 cents per pound for tobacco from the 1952 and previous crops.

The 1953 Aegean Crop is estimated at 154 million pounds and will yield an estimated 99 to 104 million pounds of American Grade.

## Outlook

The present tobacco marketing situation in Turkey is favorable for both farmers and merchants. Exports of tobacco leaf will probably increase because of its competitive price in the world market. The Soviet Bloc countries have indicated definitely that they are interested in purchasing Turkish tobacco in 1954. The Soviet Union has already contracted to purchase 55.1 million pounds of Marmara and Aegean tobacco, and Czechoslovakia has purchased 11.1 million pounds of Aegean tobacco. Under the existing circumstances, weather permitting, it seems likely that Turkey will produce another large tobacco crop in 1954.

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FT 21-54

June 7, 1954

## MISCELLANEOUS WORLD TOBACCO TRADE DEVELOPMENTS

### Birkhead Returns from Survey of Tobacco Producing Areas in Africa and Brazil

Dr. James W. Birkhead has returned from a 9 weeks' survey of tobacco producing and marketing areas of eight countries in Africa and in Brazil. The results of his investigations will be published as a series of circulars in the near future. Reports will cover the following countries: British East Africa, Madagascar, Southern Rhodesia, Northern Rhodesia, Nyasaland, Mozambique, Union of South Africa, Belgian Congo and Brazil.

### Southern Rhodesian Flue-cured Prices 1954 Crop

Salisbury auctions for the 1954 crop of flue-cured tobacco opened on March 23. Sales during the first six weeks of the season amounted to 19.7 million pounds, for an average of 35.6 pence (41.5 U.S. cents) per pound, compared with 47.7 pence (55.6 U.S. cents) for the corresponding period of 1953. The drop in prices this season is attributed to the greater quantities of nondescript tobacco selling at prices markedly lower than last year. Better-quality leaf has sold a little lower than in 1953.

Exports of flue-cured tobacco from Southern Rhodesia during the marketing season, April 1953 - March 1954, totaled 84.5 million pounds, slightly lower than in 1952-1953. The United Kingdom took 52.9 million pounds during 1953-54. Australia took 8.5 million, the Netherlands 5.9 million, Denmark and Western Germany 3 million each, the Belgian Congo 2.2 million, and Sweden, Egypt and Belgium roughly 1.0 million pounds each.

### Consumption of Virginia-Type Cigarettes Drops in Israel

Israli manufacturers report that consumption of Virginia-type cigarettes has declined from 60 percent of the total production in 1949 to 13 percent in 1953. This is reflected in United States flue-cured exports to Israel, which dropped from 800,000 pounds per year during 1947-51 to 240,000 pounds average during 1952-53. Although cigarette consumption has remained nearly constant during this period at 4.5 million pounds per year, price increases for all types of cigarettes during the last 4 years have encouraged smokers to return to the less expensive Oriental blends, thus reversing a trend that started during World War II.

Domestic production of flue-cured tobacco has not been too successful. Output has increased only moderately since the first commercial planting in 1951 when about 143,000 pounds were produced. In 1953 output totaled 220,500 pounds, but the quality was considered inferior to imported tobacco.

Reports indicate that equalization of taxes on Virginia and Oriental blends would result in increased consumption of the former and that overall tax and price reductions would in addition to increasing overall consumption allow the trend to Virginia-type cigarettes to continue. It is estimated that either of these moves would enlarge flue-cured imports to about 800,000 pounds per year.

## Indonesia Produces More Flue-cured Tobacco

An increasing percentage of the Virginia-type tobacco used in Indonesian American style cigarettes is being produced domestically. Cigarette production within the country is increasing but import licenses for Virginia leaf in 1954 were reduced to 10 million pounds. This is a large cut from 1952 when the United States, alone, shipped 13.2 million pounds to Indonesia.

Domestic production in 1953 was about 10 million pounds from 23,400 acres. The Government plans a 30 percent increase in 1954 acreage and also plans to eventually produce enough flue-cured for all domestic requirements. Indonesian tobacco manufacturers believe that this will be very difficult. The quantity can be raised but Indonesia's soil and climate are not suitable for the production of the better grades of flue-cured leaf. For this reason they believe that imports cannot drop much without sacrificing the quality of (and possibly the market for) American-type blended cigarettes.

## United Kingdom's First Quarter Tobacco Imports

The United Kingdom imported a total of 50.8 million pounds of unmanufactured tobacco during the first quarter (January-March) of 1954, compared with 32.6 million for January-March 1953. Flue-cured tobacco accounted for 42.0 million pounds of the 1954 figure, and 22.2 million pounds of this was from the United States. Last year, only 25.3 million pounds of flue-cured leaf were imported in the first quarter, of which the United States supplied 10.0 million. Larger takings of U. S. tobacco during the first quarter of 1954 reflect the increase in the allocation of dollars for tobacco purchases in the 1953-54 fiscal year.

## Philippine Congress Adjourns Without Acting on PL 698

The American Embassy at Manila has advised that the Philippine Congress adjourned on May 20 without taking action in regard to Public Law No. 698. Consequently, in accordance with provisions of that law, imports of cigarette tobacco will be limited to 11.5 million pounds in 1954. It is estimated that the requirements for this type of tobacco amount to 32.8 million pounds in 1954. There is a possibility, however, that a Senate approved bill amending PL 698 will be certified to a special session of the Philippine Congress tentatively scheduled to convene about June 15.

Prior to its adjournment the Congress approved legislation providing for the creation of a Philippine Tobacco Administration for trading, research, and the establishment of cooperatives, warehouses, and credit for tobacco producers.

## Canadian Flue-Cured Tobacco Acreage Up Sharply in 1954

It has been reported that the Ontario Flue-Cured Marketing Association will allow members to plant their full base acreage in 1954. This would allow planting of 122,000 acres with a possible production of 160-170 million pounds. In 1953 127.4 million pounds were harvested from 90,800 acres. In addition Quebec and British Colombia are expected to plant a total of about 5,000 acres of flue-cured tobacco. With this production, plus 1953 year end stocks of 134.8 million pounds, Canada will be in a position to supply more of the World's flue-cured requirements than in past years.

Total first quarter 1954 exports of flue-cured reached 16.3 million pounds compared with 10.3 million in 1953. Shipments to the United Kingdom nearly doubled from 7.8 in the first quarter of 1953 to 14.8 million pounds in the first quarter of 1954.

## India Expects Bumper Flue-Cured Harvest

India's 1953-54 crop of flue-cured tobacco is placed unofficially at about 100 million pounds, according to a report from the American Embassy at New Delhi. This compares with 81 million for 1952-53, and 90 million for 1951-52. The increase is expected as the result of excellent monsoon rains. Over the next two or three years little change is expected in the production of flue-cured tobacco in India. Year to year fluctuations will largely be the result of weather variations.

It is probable that both foreign and domestic demand for better grades of the current crop will be strong. Prices of the poorer grades are expected to be the lowest in many years due to the accumulated leaf stocks. Therefore the Indian Government and trade groups will probably make every effort to sell the surplus low grades in foreign markets.

India's purchases of U. S. flue-cured leaf are expected to reach the 4 to 5 million pounds that are needed for blending in the domestic straight Virginia cigarettes. Due to a tendency to increase the percentage of Indian leaf in these cigarettes this figure may trend downward in years to come.

## Finland Consumes More American-Blended Cigarettes

Domestically-produced American-blended type cigarettes (50-85 percent American leaf) are taking an increased share of the Finnish market according to a report from the American Legation at Helsinki. During 1953, total cigarette consumption declined 3 percent due to the high rate of unemployment and consequent loss of consumer purchasing power. Despite this drop in the total, consumption of American-blended type cigarettes increased from 0.6 billion pieces in 1952 to 0.8 billion pieces in 1953. Imports of American leaf in 1953 increased by 80 thousand pounds. The share of United States leaf used in Finnish tobacco factories has increased from 19.8 percent before the war to 28.4 percent in 1951 and to 32.4 percent in 1953.

The greatest obstacle to increased use of United States tobacco is the shortage of dollars. During 1953, 3.3 million pounds were purchased, but only 1.5 million were obtained direct. The remainder was secured from third countries where non-dollar currency could be used. The bulk of reshipped tobacco was obtained from Lebanon; the United Kingdom, Denmark, Israel also resold some United States leaf. This purchase problem has made it very difficult to maintain adequate supplies of American leaf on hand. Present stocks of American leaf are very low and manufacturers would like to build up at least a 12 month supply, especially of flue-cured. Finland recently received an allocation of 3 million dollars under Section 550 of the Mutual Security Act of 1953 to use for the purchase of United States tobacco.

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FT 22-54 June 14, 1954

# THE MARKET FOR UNITED STATES TOBACCO IN SWITZERLAND [1]

## Summary

Commercial production of tobacco in Switzerland has continued to decline since 1946. The 1953 crop is estimated to have been reduced at least by 15 percent from 1952 because of an abnormally rainy summer season. As in the past, about 85 percent of the country's supply of leaf has been imported, approximately 50 percent coming from the United States. Swiss manufacturers import some flue-cured leaf from Southern Rhodesia, Brazil and other sources. Substitutes for United States fire-cured are imported from Italy, Latin-America, and limited quantities of leaf from various sources are imported to supplement Maryland leaf in the traditional Swiss-type cigarette. Stocks of leaf tobacco held by Swiss manufacturers in January were reported sufficient to meet production requirements for the next two years. This is normal practice, as two years are considered to be the time for the leaf to age properly.

## Imports

Table 1. Switzerland: Imports of unmanufactured tobacco and supplies of domestic leaf used by manufacturers, 1935-39 and 1947-51 average, 1951 through 1953.

| | Imported Leaf | | | | | | |
|---|---|---|---|---|---|---|---|
| Year | U. S. | Orient. Type Count. 1/ | Latin America | Other | Total Imported | Domestic Leaf Used | Total All |
| | million pounds | million pounds | million pounds | million pounds | million pounds | million pounds | million pounds |
| 1935-39 | 6.2 | 1.7 | 3.8 | 4.1 | 15.8 | 1.9 | 17.7 |
| 1947-51 | 11.5 | 3.1 | 5.9 | 2.1 | 22.6 | 4.1 | 26.7 |
| 1951 | 11.7 | 3.6 | 4.7 | 3.4 | 23.4 | 4.3 | 27.7 |
| 1952 | 11.9 | 4.1 | 4.7 | 4.0 | 24.7 | 4.2 | 28.9 |
| 1953 | 11.8 | 4.2 | 4.5 | 5.0 | 25.5 | 2/ | 2/ |

1/ Principally from Turkey, Greece and Bulgaria.
2/ Not available until August 1954.

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[1] Based on a report submitted by Clyde L. Clark, Consul, American Embassy, Zurich, Switzerland

Official published import data on leaf tobacco lists only clearances from bond; consequently they more nearly reflect utilization by manufacturers than total imports, which would include quantities going into bond. Imports of leaf tobacco have substantially increased from the prewar average of 15.8 million pounds. Imports during 1953 were 25.5 million pounds and were 3.2 percent larger than 1952. Imports from the United States during 1953 consisted of: Maryland 50 percent; flue-cured 25 percent, Burley about 10 percent, and other tobaccos about 15 percent. Swiss imports of Maryland leaf are equivalent to approximately 15 percent of the entire U. S. crop of Maryland tobacco. Imports of U. S. fire-cured leaf are expected to continue to decline because of increased competition from Italian-grown fire-cured leaf and a smaller domestic cigar consumption.

## Consumption

The trend in total consumption of tobacco products continued upward through 1952 due to increased use of cigarettes. Consumption of cigars and smoking tobacco continued downward.

Table 2. Switzerland: Consumption of tobacco products, 1935-39, 1947-51 average, 1951 through 1953.

| Year | Cigarettes | Cigars | Smoking Tobacco | Total |
|---|---|---|---|---|
| million pounds | million pounds | million pounds | million pounds | million pounds |
| 1935-39 | 4.6 | 5.4 | 5.8 | 15.8 |
| 1947-51 | 10.5 | 5.0 | 5.1 | 20.6 |
| 1951 | 11.2 | 4.4 | 5.0 | 20.6 |
| 1952 | 12.2 | 4.3 | 5.0 | 21.5 |
| 1953 1/ | | | | |

1/ Not available until August, 1954

Note: Tobacco consumption figures are not indicative of the total output, since exports to other European countries account for about 4 to 5 million pounds annually. Italy is the chief export market for Swiss cigarettes importing about 3.5 million pounds annually.

Cigarette production was up substantially in 1953, primarily due to expanded exports to Italy, rather than to an increased demand in the domestic market. The relatively stable level of domestic consumption of cigarettes during the past three years is attributed to consumer resistance to higher retail prices for the most popular brands which have been averaging the equivalent of about 22 United States cents per package. Although prices for Maryland tobacco, the type most in demand for Swiss cigarettes, have advanced, manufacturers have been able, by increased production for export, to hold retail prices down. Exports to Italy, Switzerland's most important market for cigarettes, increased 22 percent over 1952.

Cigarettes containing about 60 to 80 percent of choice Maryland tobacco represent about 45 percent of the total sales of cigarettes. Oriental type cigarettes are the next most popular. The output of other cigarettes such as the American blended type and straight Virginia, has declined because of consumer price resistance. Retail prices for these two kinds of cigarettes are equivalent, on the average, to about 28 to 39 U. S. cents per package of 20. Output of cigarettes containing high percentages of domestic tobacco, which range in price from 15 to 20 U. S. cents per package of 20 cigarettes, also is declining.

The Swiss manufacturers of cigars claim that they will soon have to increase retail prices for cigars and cheroots or produce them at a loss. The cigar industry relies largely on hand labor, unlike the cigarette industry which is highly-mechanized and operates on a lower per unit cost basis. In combating higher production costs, cigar manufacturers have decreased use of Sumatra leaf and have sought other sources of leaf at lower competitive prices. The use of U. S. type 62 by cigar manufacturers is beginning to replace the Java wrapper.

## Outlook

Purchases of United States tobacco by Swiss manufacturers of tobacco products are expected to continue to be governed by the demand for the leaf in various products and price relationships with competitive tobacco from other sources. Prices, plus quality, will be the predominant factors governing purchases of leaf by the Swiss manufacturers in 1954. Present outlook for 1954 indicates an increase in demand for Maryland leaf, a decrease in demand for flue-cured, Types 11 to 14, and a considerable decrease for Kentucky and Tennessee fire-cured, Types 22 to 24. Demand for Burley is expected to remain stable, but the market for Virginia fire-cured leaf depends upon the price.

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June 29, 1954

## MISCELLANEOUS WORLD TOBACCO TRADE DEVELOPMENTS

### Exports Bolstered by Section 550 Funds

During the past fiscal year, ending June 30, 1954, tobacco exports were materially assisted by procurement authorizations made under the provisions of Section 550 of the Mutual Security Act of 1953. According to latest information, a total of about $38.4 million worth of tobacco was covered by authorizations made during the 1953-54 fiscal year. The breakdown by types of tobacco was about as follows: Flue-cured, $31.0 million (47 million pounds); Burley, $4.0 million (8 million pounds); fire-cured, $2.9 million (7 million pounds); and dark air-cured $0.5 million (2 million pounds). All of this tobacco has not moved out as yet.

It should be noted that these figures are tentative in some cases, particularly with respect to the quantities shown with the dollar figures. The dollar value of the authorizations was sufficient to cover the exportation of 60 to 65 million pounds of leaf tobacco - roughly equivalent to 13 percent of total United States 1953-54 exports.

Under legislation now being considered by the Congress, $1 billion worth of surplus agricultural commodities could be sold abroad for foreign currencies over a 3-year period to end June 30, 1957. It is presumed that tobacco would be shipped abroad in considerable amounts under any such legislation that might be enacted.

### U. S. Tobacco Exports in April 1954

United States exports of unmanufactured tobacco in April 1954, totaled 27.6 million pounds valued at $16.6 million. This was 5.9 million pounds higher than in March, but 45 percent below April 1953.

Exports of flue-cured tobacco were 18.7 million pounds in April compared to 44.7 million for April 1953, a 58 percent decrease. This can be accounted for in large measure by decreased shipments to the United Kingdom (15,000 pounds in April of this year, compared to 29.5 million pounds in April 1953). All other types showed increases with the exception of One Sucker, Cigar Binder and Cigar Filler.

In the first 4 months of the current year, total tobacco leaf exports, at 98.7 million pounds, were 32 percent below the same period last year. Exports of flue-cured, at 77.1 million, were off 36 percent, but exports of

Burley, at 8.1 million pounds, were 35 percent higher than a year earlier. Exports of most other types fell off.

Exports of U. S. Unmanufactured Tobacco, April 1954,
January-April 1954 with Comparisons
(Export Weight)

| Type | April | | Jan.-April | |
|---|---|---|---|---|
| | 1953 | 1954 | 1953 | 1954 |
| | - - - - - - - - 1,000 pounds | - - - - - - - - | | |
| Flue-Cured | 44,675 | 18,729 | 121,212 | 77,065 |
| Burley | 2,167 | 3,812 | 5,954 | 8,051 |
| Virginia Fire-Cured | 65 | 429 | 1,349 | 1,195 |
| Dark-Fired Kentucky-Tennessee | 1,214 | 2,069 | 7,908 | 5,535 |
| Maryland | 611 | 1,080 | 2,437 | 2,060 |
| Green River | 21 | 64 | 988 | 835 |
| One Sucker | 140 | 119 | 314 | 277 |
| Cigar Wrapper | 322 | 342 | 1,317 | 902 |
| Cigar Binder | 335 | 170 | 1,260 | 517 |
| Cigar Filler | 14 | -- | 147 | 147 |
| Other | 540 | 746 | 1,894 | 2,130 |
| Total | 50,104 | 27,560 | 144,780 | 98,714 |
| Declared value, million dollars | 33.1 | 16.6 | 93.5 | 63.1 |

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

Exports of tobacco products in April 1954, with the exception of packaged smoking tobacco, were higher than in April a year ago. Total valuation of all exported products rose to $5.8 million in April 1954 from $4.9 million in April 1953. For the 4-month period, January-April 1954, however, exports of cigarettes and package smoking tobacco were below those for January-April 1953.

Exports of U. S. Tobacco Products April 1954, with Comparisons

| Class of Products | April 1953 | April 1954 | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|---|---|
| Cigars and Cheroots (1,000 pieces) | 490 | 1,014 | 1,553 | 3,014 |
| Cigarettes (1,000 pieces) | 1,330,699 | 1,414,664 | 5,797,540 | 5,125,906 |
| Chewing Tobacco and Snuff (1,000 pounds) | 62 | 139 | 375 | 528 |
| Smoking Tobacco in Packages (1,000 pounds) | 60 | 55 | 231 | 181 |
| Smoking Tobacco in Bulk (1,000 pounds) | 143 | 538 | 1,090 | 1,202 |
| Declared value (million dollars) | 4.9 | 5.8 | 21.5 | 20.3 |

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

## Cuba's Leaf Exports Off Slightly; Cigar Exports Up in 1953

Cuban tobacco and leaf sold well during 1953 in the world market. Value of tobacco exports in 1953 was $42.1 million, a slight rise over the 1952 figure of $41.7 million. Leaf exports declined from 40.4 million pounds in 1952 to 36.1 million pounds in 1953 but the number of cigars exported rose from 37.6 million in 1952 to 44.9 million in 1953.

Imports of tobacco and tobacco products dropped 24 percent from 1952 in volume and 20 percent in value. Cigarette imports dropped from 394.2 million units to 295.9 million units. Tobacco products other than cigarettes are not imported in significant quantities. The largest percentage of cigarettes imported came from the United States.

There was a small decrease in domestic consumption of all types of tobacco products, attributed to a generally reduced level of business activity. The year 1954 brings other problems. Production in the 1953-54 season was a near record 90.0 million pounds. Stocks at the beginning of the year totaled nearly 80.0 million pounds. Aggravating this situation is the dollar scarcity and growing competition in many markets. This has caused buyers to lower price offers even though the crop is of good quality.

## Philippine Developments

Preliminary estimates of the Philippine flue-cured crop for 1953-54 range from 4 million pounds to 6 million pounds. It appears likely that the crop will amount to about 4.5 million pounds. This is a large increase over 1952-53 when a 2 million pound crop was produced.

Due to lack of rain the second planting produced short dark leaf. Manufacturers believe this to be of too low quality to use and believe that 2 million pounds of the crop will fall in this class. Last year, use of Virginia-type leaf amounted to 28 million pounds.

A usable crop of about 2.5 million pounds would supply a little less than 10 percent of the quantity used last year in cigarette manufacture. It is considered probable that the entire crop of 4.5 million pounds will be used without regard to quality, supplying about 16 percent of the quantity needed.

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The American Embassy at Manila reports that the Philippine Congress recently passed legislation to establish a Philippine Tobacco Administration (PTA). This bill has the backing of the President and it is expected that he will sign it.

The PTA is to be a Government corporation under the supervision of the Office of Economic Coordination. It will replace the National Tobacco Corporation which was abolished in 1950. Capitalization will be in the form of a 2 million peso per year appropriation for the next 5 years. This fund will allow 20 percent for operating expenses, 70 percent for trading activities, and 10 percent for research. Assets of the defunct National Tobacco Corporation will be transferred to the PTA as additional capital.

Many functions are assigned to the PTA relating to the production, processing, storage, transportation, marketing, manufacturing and price support of tobacco leaf, tobacco products and tobacco by-products. Credit facilities and other services may also be provided.

Anyone interested in provisions of the law may obtain a copy by writing the Tobacco and Tropical Products Division, Foreign Agricultural Service, Department of Agriculture, Washington 25, D. C.

## First Quarter 1954 Danish Tobacco Leaf Imports

Danish leaf imports for the first quarter of 1954 shows 68 percent more leaf was imported from the United States than in the first quarter of 1953. Total first quarter imports rose only 8 percent over the corresponding 1953 period. Imports from European countries dropped 88 percent from the first quarter of 1953 and imports from both Brazil and Indonesia were lower.

Denmark: Imports of Leaf Tobacco by Country of Origin

| Origin | Jan.-March:1953 | Jan.-March:1954 | Percent change from 1953 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | Percent |
| Europe | 482 | 58 | - 88 |
| United States | 1,767 | 2,962 | + 68 |
| Brazil | 856 | 791 | - 7 |
| Indonesia | 309 | 292 | - 6 |
| Other | 738 | 376 | - 49 |
| Total | 4,152 | 4,479 | + 8 |

Source: Danish Statistical Department.

## Swiss Imports of Leaf Tobacco Hold Steady

The first quarter 1954 imports of leaf tobacco by Switzerland are slightly larger than in 1952 and 1953. Indications are that imports will hold at near the level of previous years. Switzerland is holding a high level of business activity, but has relaxed a little from the boom economy of the past few years.

Switzerland: Imports of Leaf Tobacco by Country of Origin

| Origin | Jan.-March:1952 | Jan.-March:1953 | Jan.-March:1954 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Italy | 195 | 281 | 400 |
| Greece | 359 | 335 | 403 |
| Turkey | 555 | 534 | 550 |
| Indonesia | 274 | 327 | 323 |
| United States | 2,779 | 2,706 | 2,664 |
| Dominican Republic | 210 | 202 | 201 |
| Brazil | 1,098 | 1,097 | 1,044 |
| Other | 344 | 320 | 462 |
| Total | 5,814 | 5,802 | 6,047 |

Source: Swiss Statistical Tables of Foreign Commerce.

## Benelux Drops Import Restrictions on Unmanufactured Tobacco

Benelux, the customs union of Belgium, Netherlands and Luxembourg recently announced the end of import restrictions on unmanufactured tobacco from dollar areas. This relaxation of import regulations will make it a much simpler matter to negotiate and export United States tobacco to these areas. This action was made possible by the improved dollar position of these countries.

## Egypt to Allow Domestic Tobacco Production

The American Embassy at Cairo reports that the Counsel of Ministers authorized production of tobacco in Egypt for the first time in 64 years. Egyptian soil is not considered suitable for growing a good quality of tobacco and production was never large. In 1890 all domestic production was forbidden to protect the tariff revenues on tobacco (which were easier to collect than internal excise duties).

Egypt has been an important tobacco importing country as a result of this ban. Tobacco imports have been decreasing since 1949 as a result of constantly rising tariffs. The last tariff increase was in February 1954 when rates rose from U. S. $5.62 per pound to U. S. $6.36, increasing the price per pack of 20 cigarettes from 43 U. S. cents to 46.

Total imports of unmanufactured tobacco declined from 27.9 million pounds in 1951 to 24.2 million in 1953. Imports from the U. S., however, increased from 3.9 million pounds to 5 million pounds over the same period.

This has resulted from the decided trend toward straight Virginia and blended types of cigarettes. Consumption of these types increased from 37.5 percent of the market in 1951 to 42.2 percent in 1953. About 75 percent of the imports from the U. S. last year were flue-cured and 24 percent Burley. It is doubtful that Egypt can produce substitutes for these tobaccos.

Production can not start on tobacco until spring of 1955. This will put a crop on the market in late 1955 or early 1956. First plantings will probably be of an experimental nature and it is highly improbable that any production of significance will be sold before 1958.

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FT 24-54

July 6, 1954

# UNITED STATES EXPORTS OF UNMANUFACTURED TOBACCO, JANUARY-APRIL 1954, WITH COMPARISONS

Table 1. Exports of Unmanufactured Tobacco from the United States, by Types, January-April 1954, with Comparisons

| Type | Calendar Years |  |  | Jan.-April 1/ |  | Jan.-April 1954 as percent of Jan.-April 1953 |
|---|---|---|---|---|---|---|
|  | Average 1947-51 | 1952 | 1953 1/ | 1953 | 1954 |  |
|  | 1,000 Pounds | 1,000 Pounds | 1,000 Pounds | 1,000 Pounds | 1,000 Pounds | Percent |
| Flue-Cured | 388,078 | 319,270 | 444,306 | 121,212 | 77,034 | 63 |
| Burley | 32,865 | 26,871 | 25,007 | 5,954 | 8,051 | 135 |
| Kentucky-Tennessee | 24,591 | 21,752 | 19,485 | 7,908 | 5,535 | 70 |
| Virginia Fire-Cured | 6,046 | 4,860 | 4,276 | 1,349 | 1,196 | 89 |
| Virginia Sun-Cured 2/ | -- | 277 | 42 | -- | 28 | -- |
| Maryland | 7,349 | 5,807 | 8,135 | 2,437 | 2,060 | 84 |
| Green River | 1,726 | 2,260 | 1,829 | 988 | 835 | 84 |
| One Sucker | 3,063 | 1,535 | 1,023 | 314 | 277 | 88 |
| Black Fat | 4,669 | 3,204 | 3,881 | 1,002 | 1,034 | 103 |
| Cigar Leaf: |  |  |  |  |  |  |
| Wrapper 2/ | -- | 3,061 | 3,901 | 1,216 | 902 | 74 |
| Binder 2/ | -- | 2,848 | 3,100 | 1,351 | 517 | 38 |
| Filler 2/ | -- | 853 | 587 | 147 | 147 | 100 |
| Total Cigar Leaf | 9,770 | 6,762 | 7,588 | 2,714 | 1,566 | 58 |
| Perique | 79 | 60 | 66 | 36 | 35 | 97 |
| Trimmings, Stems & Scraps | 8,116 | 3,622 | 3,027 | 855 | 1,033 | 121 |
| Total | 486,352 | 396,280 | 518,665 | 144,769 | 98,684 | 68 |

1/ Preliminary. 2/ Class established January 1952. Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

## Flue-Cured

There was a substantial decrease in flue-cured tobacco exports for Jan.-April 1954 compared with the same period in 1953. The largest decrease is reflected in greatly reduced takings by the United Kingdom. In the first 4 months of 1953, however, considerable quantities of tobacco which normally would have moved to the United Kingdom in the fall of 1952, were exported under the provisions of an option purchase arrangement. Other countries taking less tobacco include West Germany, Portugal, Italy (which has taken no flue-cured tobacco for 1954 compared with 542,000 pounds for the same period in 1953), Yugoslavia, Thailand, Indonesia and Australia. There were increased takings by Uruguay, Norway, Ireland, the Netherlands, Belgium and Luxembourg, Finland, Spain, the Philippines and New Zealand.

## Burley

Exports of Burley tobacco increased in the first 4 months of 1954 over the same period 1953. Mexico, Norway, the Netherlands, West Germany and Portugal took more than in the same period a year ago. The sharpest declines were in exports to Austria and to France, which took no Burley for the period compared with 707,000 pounds in January-April 1953.

## Dark-Fired Kentucky-Tennessee

Exports of dark-fired Kentucky-Tennessee declined in the first 4 months of 1954. There were no exports of Kentucky-Tennessee to Spain for that period compared with 1.9 million pounds for the 1953 period. There were decreases in exports to Ireland, France and French West Africa. Slight increases were reflected in takings by Denmark, West Germany, Indonesia, the Cameroons and Indochina.

## Virginia Fire-Cured and Sun-Cured

Exports of Virginia fire-cured tobacco decreased slightly with the United Kingdom, West Germany, Switzerland and Australia taking less in 1954 than in 1953. Exports of Virginia sun-cured tobacco during January-April 1954, totaling 28,000 pounds, went to Norway and Honduras. There were no exports for the first 4 months of 1953.

## Maryland, Green River, One Sucker, Black Fat

Exports of Maryland, Green River, and One Sucker tobacco for the first 4 months of 1954 show slight decreases compared with the same period in 1953. Exports of Black Fat show a very small increase.

## Cigar Leaf

Exports of cigar wrapper reflect a decrease in 1954 over the 1953 period. Exports of cigar binder also decreased. (There were no exports in 1954 to East Germany compared with 969,000 pounds in 1953). Exports of cigar filler were identical for the first 4 months of 1953-54.

## Perique and Trimmings, Stems and Scraps

Exports of Perique were practically the same for 1953 and 1954, while exports of Trimmings, Stems and Scraps increased for the first 4 months of 1954. A sharp decrease in exports to Tangier for 1954 was offset in increased takings by all the countries with the exception of the Canary Islands.

## Table 2. Exports of Unmanufactured Tobacco from the United States, by Type and Principal Countries of Destination, January-April, 1953 and 1954

### FLUE-CURED

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Mexico | 518 | 512 |
| El Salvador | 250 | 200 |
| Uruguay | -- | 630 |
| Norway | 690 | 1,771 |
| Denmark | 921 | 1,014 |
| United Kingdom | 51,703 | 12,302 |
| Ireland | 1,773 | 1,917 |
| Netherlands | 8,874 | 9,347 |
| Belgium and Luxembourg | 1,484 | 1,840 |
| Western Germany | 15,676 | 11,693 |
| Austria | 1,349 | 1,106 |
| Switzerland | 774 | 930 |
| Finland | 505 | 1,061 |
| Spain | 17 | 490 |
| Portugal | 2,483 | 1,761 |
| Malta | 349 | 332 |
| Italy | 542 | -- |
| Yugoslavia | 509 | 182 |
| India | 381 | 241 |
| Pakistan | 559 | 635 |
| Ceylon | 200 | 290 |
| Thailand | 2,304 | 1,803 |
| Indochina | 795 | 511 |
| Indonesia | 4,517 | 3,921 |
| Philippines | 5,631 | 7,198 |
| Hong Kong | 1,437 | 1,232 |
| Taiwan | 527 | 395 |
| Japan | 5,859 | 4,763 |
| Australia | 5,389 | 2,991 |
| New Zealand | 1,421 | 2,443 |
| Egypt | 1,778 | 1,624 |
| Nigeria | 273 | 131 |
| British East Africa | 112 | 148 |
| Other | 1,612 | 1,620 |
| Total | 121,212 | 77,034 |

### BURLEY

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Mexico | 274 | 882 |
| Norway | 48 | 151 |
| Denmark | 101 | 53 |
| Netherlands | 85 | 798 |
| Belgium and Luxembourg | 1,109 | 735 |
| Western Germany | 514 | 1,564 |
| Switzerland | 371 | 163 |
| Finland | 136 | 37 |
| Portugal | 386 | 2,042 |
| Philippines | 245 | 292 |
| Hong Kong | 85 | 110 |
| Australia | 13 | 59 |
| Egypt | 321 | 131 |
| France | 707 | -- |
| Austria | 850 | 365 |
| Other | 709 | 669 |
| Total | 5,954 | 8,051 |

### DARK-FIRED KENTUCKY-TENNESSEE

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Peru | -- | 110 |
| Sweden | -- | 108 |
| Denmark | 212 | 377 |
| United Kingdom | 288 | 132 |
| Ireland | 325 | 149 |
| Netherlands | 1,173 | 1,035 |
| Belgium and Luxembourg | 116 | 193 |
| France | 1,335 | 1,108 |

Continued -

Table 2. Exports of Unmanufactured Tobacco from the United States, by Type and Principal Countries of Destination, January-April, 1953 and 1954

DARK-FIRED KENTUCKY-TENNESSEE
(Continued)

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Western Germany | 158 | 190 |
| Switzerland | 593 | 591 |
| Spain | 1,851 | -- |
| Portugal | 84 | 76 |
| Indonesia | 142 | 220 |
| New Zealand | 40 | 70 |
| Algeria | 48 | 49 |
| Cameroon | 49 | 103 |
| French West Africa | 251 | 183 |
| Gold Coast | 70 | 88 |
| Iceland | -- | 68 |
| Azores | 48 | 22 |
| Indochina | -- | 51 |
| Egypt | 71 | 24 |
| Other | 1,054 | 588 |
| Total | 7,908 | 5,535 |

VIRGINIA FIRE-CURED

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Trinidad & Tobago | 66 | -- |
| Sweden | 92 | 233 |
| Norway | 425 | 636 |
| United Kingdom | 278 | 53 |
| Netherlands | 72 | 79 |
| Western Germany | 82 | 11 |
| Austria | 97 | -- |
| Switzerland | 45 | 12 |
| Australia | 155 | 107 |
| Ireland | 34 | 56 |
| Other | 3 | 9 |
| Total | 1,349 | 1,196 |

VIRGINIA SUN-CURED

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Honduras | -- | 1 |
| Norway | -- | 27 |
| Other | -- | -- |
| Total | -- | 28 |

MARYLAND

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Denmark | 17 | 22 |
| Netherlands | 89 | 41 |
| Belgium and Luxembourg | 67 | 86 |
| Western Germany | 66 | 255 |
| Switzerland | 1,918 | 1,493 |
| Spain | 77 | 48 |
| French Morocco | 202 | -- |
| Tunisia | -- | 93 |
| Other | 1 | 22 |
| Total | 2,437 | 2,060 |

GREEN RIVER

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| United Kingdom | 848 | 678 |
| Netherlands | 125 | -- |
| Belgium and Luxembourg | -- | 118 |

Continued -

### Table 2. Exports of Unmanufactured Tobacco from the United States, by Type and Principal Countries of Destination, January-April, 1953 and 1954

#### GREEN RIVER (Continued)

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Liberia | 15 | 30 |
| Other | -- | 9 |
| Total | 988 | 835 |

#### ONE SUCKER

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Trinidad & Tobago | -- | 13 |
| Netherlands | 16 | -- |
| Belgium & Luxembourg | 101 | 40 |
| Canary Islands | -- | 26 |
| Nigeria | 176 | 169 |
| Other | 21 | 29 |
| Total | 314 | 277 |

#### BLACK FAT

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Bahamas | 16 | 5 |
| Netherlands Antilles | 13 | 11 |
| Canary Islands | 10 | 22 |
| Cameroon | 9 | 36 |
| French West Africa | 156 | 123 |
| Gold Coast | 362 | 206 |
| Nigeria | 428 | 603 |
| Western Portuguese Africa | -- | 18 |
| Other | 8 | 10 |
| Total | 1,002 | 1,034 |

#### CIGAR WRAPPER

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Canada | 127 | 71 |
| Brazil | 28 | 14 |
| Denmark | 34 | 51 |
| Netherlands | 104 | 81 |
| Belgium & Luxembourg | 157 | 114 |
| Western Germany | 539 | 492 |
| Eastern Germany | 143 | -- |
| Canary Islands | 6 | 29 |
| Other | 78 | 50 |
| Total | 1,216 | 902 |

#### CIGAR BINDER

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Canada | 6 | 64 |
| Sweden | 1 | 38 |
| Denmark | 33 | 6 |
| Netherlands | 90 | 21 |
| Belgium & Luxembourg | 166 | 85 |
| Western Germany | 71 | 261 |
| Eastern Germany | 969 | -- |
| Australia | -- | 22 |
| Other | 15 | 20 |
| Total | 1,351 | 517 |

Table 2. Exports of Unmanufactured Tobacco from the United States, by Type and Principal Countries of Destination, January-April, 1953 and 1954

CIGAR FILLER

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Canada | 41 | -- |
| Netherlands | -- | 29 |
| Gibraltar | 14 | 8 |
| Indochina | -- | 110 |
| Algeria | 85 | -- |
| Other | 7 | -- |
| Total | 147 | 147 |

TOTAL CIGAR LEAF

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Canada | 174 | 135 |
| Brazil | 28 | 14 |
| Sweden | 1 | 38 |
| Denmark | 67 | 57 |
| Netherlands | 194 | 131 |
| Belgium & Luxembourg | 323 | 199 |
| Western Germany | 610 | 753 |
| Eastern Germany | 1,112 | -- |
| Gibraltar | 14 | 8 |
| Indochina | -- | 110 |
| Australia | -- | 22 |
| Algeria | 85 | -- |
| Canary Islands | 6 | 29 |
| Other | 100 | 70 |
| Total | 2,714 | 1,566 |

PERIQUE

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Norway | 10 | -- |
| United Kingdom | 24 | 33 |
| Other | 2 | 2 |
| Total | 36 | 35 |

TRIMMINGS, STEMS & SCRAPS

| Country | Jan.-April 1953 | Jan.-April 1954 |
|---|---|---|
| | 1,000 Pounds | 1,000 Pounds |
| Sweden | 128 | 225 |
| Norway | 95 | 108 |
| Denmark | 17 | 68 |
| Western Germany | 39 | 51 |
| Jordan | -- | 78 |
| French Morocco | -- | 132 |
| Tangier | 412 | 97 |
| Canary Islands | 61 | 14 |
| Other | 103 | 260 |
| Total | 855 | 1,033 |

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

AUG 1

FT 25-54 July 22, 1954

## RHODESIAN FLUE-CURED PRICES INCREASE; MARKETINGS DOWN FROM PREVIOUS ESTIMATE

Production and prices of Southern Rhodesian flue-cured are important to U. S. tobacco farmers and trade people, as Southern Rhodesia is our number one tobacco competitor abroad.

Production of Leaf Tobacco in Northern and Southern Rhodesia and Nyasaland by Kind - Averages 1935-39 - 1947-51 - Annual 1952-54
(Farm Sales Weight)

| Area and Kind of Tobacco | Period 1/ 1935-39 | 1947-51 | 1952 | 1953 | 1954 (Estimate) |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| So. Rhodesia | | | | | |
| Flue-cured | 24,623 | 81,515 | 98,969 | 105,148 | 112,500 |
| Fire-cured | 862 | 913 | 635 | 368 | 560 |
| Turkish | 665 | 1,445 | 159 | 150 | 250 |
| No. Rhodesia | | | | | |
| Flue-cured | | | | | |
| Eastern Area | 1,627 | 3,132 | 4,105 | 3,585 | 3,000 |
| Western Area | 88 | 1,341 | 5,419 | 6,739 | 5,000 |
| Dark Sun-cured | 45 | 74 | 28 | 20 | 2/ |
| Burley | 2/ | 205 | 124 | 120 | 105 |
| Turkish | 10 | 391 | 50 | 30 | 100 |
| Nyasaland | | | | | |
| Flue-cured | 2,267 | 2,697 | 3,460 | 3,568 | 3,851 |
| Fire-cured | 12,149 | 20,976 | 15,484 | 23,838 | 21,966 |
| Dark sun air-cured | 1,335 | 3,929 | 2,994 | 6,270 | 5,190 |
| Burley | 2/ | 1,025 | 998 | 1,673 | 1,827 |

1/ Year of harvest

2/ Not available; if any produced included in sun-air-cured

The latest estimates of the 1954 flue-cured harvest in Southern and Northern Rhodesia (harvested February - April) reflect smaller production than expected earlier. Prior to harvest the Southern Rhodesian flue-cured crop was estimated at about 120 million, which was lowered to 117 million about April 1 and further to 112.5 million in June. Also, the estimate of the 1954 Northern Rhodesian flue-cured harvest was reduced from 8.9 million pounds to 8.0 million in June---prior to harvest about 10 million pounds were unofficially predicted. The decrease in Northern Rhodesia was due to a decrease of 900,000 pounds in earlier estimates for the Western area, with no change in earlier estimates for the Eastern area. Southern Rhodesian estimates of dark fire-cured harvested in 1954 were decreased from the early figure of 625,000 to 560,000 pounds. Northern Rhodesian burley harvested in 1954 is now estimated at 105,000 pounds, somewhat below previous estimates. Estimates of the 1954 outturn of Nyasaland dark fire-cured have been increased from earlier predictions.

## Prices of Southern Rhodesian Flue-cured

Early in the 1954 marketing season, the prices of low-medium and low grades were far below prices received in the similar period of 1953. The average price received for Southern Rhodesian flue-cured sold on auction during the first six weeks of the 1954 marketing season (March 23-May 4) was only 35.6 pence per pound (41.5 U. S. cents), substantially below prices received in the corresponding period of 1953. In the tenth week of sales ending May 27, an average of 41.71 pence (48.7 U. S. cents) was received for Southern Rhodesian flue-cured sold on Salisbury auction floors. The average for the total sales of the first ten weeks (ending May 20) was 37.08 pence (43.3 U. S. cents). According to a recent report, during the fourth week of June, Southern Rhodesian flue-cured sold on the Salisbury auction market averaged approximately 43 pence (49 U. S. cents) per pound. Prices have hardened to such an extent in recent weeks that the average price received for the total seasons sales from March 23 through June 29 had increased to 38.84 pence (45.3 U. S. cents).

Average Prices Received for South Rhodesian
Flue-cured on Salisbury Auction Sales

| Year | Price | |
|---|---|---|
| | Pence Per Lb. | U. S. Cents Per Lb. |
| | Pence | Cents 1/ |
| 1949 | 31.86 | 37.2 |
| 1950 | 37.65 | 43.9 |
| 1951 | 34.58 | 40.4 |
| 1952 | 42.83 | 50.0 |
| 1953 | 39.70 | 46.3 |
| 1954 2/ | 38.84 | 45.3 |

1/ Pence converted to U. S. cents on the basis of $2.80 per Southern Rhodesian pound.

2/ For sales in the period March 23-June 29.

It was reported late in May that demand for all grades of Southern Rhodesian flue-cured strengthened greatly. Part of the increase in prices was attributed to improved quality of leaf marketed. The total proportion of nondescript in the June sales is indicated as much lower than in that portion of the crop sold early in the marketing season. The demand is very strong for "English" types of leaf with good body, texture and flavor. The increase in average price in the last few weeks has been partly due to firmer prices for lugs, but is chiefly due to very sharp increases (more than double the prices on some grades in the first few weeks of the season) in prices paid for low and low-medium grades, particularly nondescript and scrap-strips, which are described as heavier, but no brighter than earlier marketings. Part of the increase in prices may be due to the decrease in estimates of the amounts of Southern and Northern Rhodesian flue-cured for sale in the 1954 marketing season. Some of the increase in price is due to the sales of better-quality Southern Rhodesian leaf than earlier in the season. Also, it is believed that certain United Kingdom purchasers were concerned that average prices paid earlier in the season were not sufficient to stimulate increased flue-cured production in the Federation (The British Territories of Southern Rhodesia, Northern Rhodesia and Nyasaland are now known as the Federation of the Rhodesias and Nyasaland), the main non-dollar source of United Kingdom and Australian Tobacco imports.

As of June 29, a total of about 59 million pounds (farm sales weight) of flue-cured leaf were reported as having been sold on the Salisbury auction floors since the 1954 marketing season began on March 23. By June 29th the U. K. had purchased about 34 million pounds which is about 60 percent of the total seasons sales of flue-cured to date; Australia had purchased nearly 5.5 million pounds and about 20 million pounds had been purchased by buyers from all other nations, including sales for local consumption.

## MISCELLANEOUS TOBACCO TRADE DEVELOPMENTS

### Japan Increases Flue-cured Tobacco Acreage

Flue-cured tobacco acreage in Japan for 1954 has been increased to 109,000 acres, compared with the 1953 plantings of 98,000 acres. Production this year is forecast by the Monopoly Bureau at 162 million pounds, - up 28 percent from the 1953 figure of 127 million. Larger production for 1954 was necessary in order to rebuild stocks that were depleted by increasing consumption on the one hand and reduced yields during 1951-53 (brought about by unfavorable weather conditions) on the other hand.

### Tobacco Production up in Algeria

Algeria's tobacco production rose in 1953 to 56.7 million pounds, a 17.7 percent increase over the 47 million pounds harvested in 1952. The larger production was not encouraged by the government which had planned for tobacco production to remain constant during 1953-56.

There may be a large amount of lower-grade tobacco in this increase as it usually results from planting marginal land that produces poor quality, hard-to-sell tobacco.

Cigarette manufacturers would still like to purchase about 4 million pounds of United States leaf for blending in 1954. This would meet a preference trend of smokers toward American-type cigarettes. However, there is no indication that the government will allow dollars for this purpose.

## Greek First Quarter Tobacco Fxports Lower Than Last Year

Tobacco exports from Greece during the first quarter of 1954 were 29.7 million pounds, a drop of 13 percent from the 34.2 million pounds exported during the comparable 1953 period. Although exports have moved at a lower rate during this period, stocks of pre-1953 tobacco are selling well enough to eliminate most of this carryover.

A very favorable factor in the Greek tobacco trade has been the continued buying of the Soviet Bloc. In 1953 (their first year of buying since the war) they took 13.4 million pounds and during the first quarter of 1954 they bought 4.0 million pounds.

## Cigarette Manufacture Booms in Paskistan

Cigarette production in Pakistan jumped from 241 million pieces in 1949 to 4.0 billion in 1953. This resulted from a complete ban on cigarette imports and restrictions imposed on the importation of bidis from India for the past two years. (Bidis are cigarette-like smokes made with a little tobacco rolled in a leaf). These actions, taken to conserve foreign exchange, left a large unfilled demand within the country.

Record production of cigarettes in 1953 was reached with the two existing factories working double shifts. In May 1954 a new factory began production at Chittagong capable of producing 360 million cigarettes per year. Permission has been granted to construct several new factories, but import licenses for machinery have been issued for only one plant. If all of the plants are built that have construction permits there will be an installed capacity of about 8.4 billion cigarettes a year. Estimates of potential cigarette demand range from 7 to 10 billion per year. It would ordinarily take two or more years to complete the new plants but the cigarette shortage may speed up their construction.

The production goal for cigarettes in 1954 is 5.0 billion, which will require about 12.1 million pounds of tobacco. It is estimated that domestic leaf tobacco production will supply about 9.6 million pounds. To supplement this, imports of 2.5 million pounds of flue-cured leaf will be needed compared with the 2 million pounds imported in 1953.

## Puerto Rican Crop Revised Downward

An estimate made on April 30, 1954 placed the 1953-54 crop of tobacco in Puerto Rico at 34.1 million pounds. This compares with the January 31 estimate of 36.7 million pounds. The reduction is attributed to unfavorable weather conditions late in the growing season.

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## MISCELLANEOUS TOBACCO DEVELOPMENTS

### Estimate of Canadian Flue-Cured Production

The American Embassy at Ottawa estimates the 1954 Canadian flue-cured tobacco crop at about 140 million pounds. This represents an increase over the 132 million pounds produced in 1953 but is not as high as was considered possible earlier in the year.

### Greece Expects a Record Tobacco Crop in 1954

Reports from Athens forecast a 1954 Greek tobacco crop at a postwar record of 141 million pounds. The 1953 crop produced 135 million pounds. American grades of tobacco for 1954 are estimated at 57 million pounds compared with 50 million pounds produced in 1953. Estimates place the European grades at 53 million pounds compared to 50 million pounds produced in 1953.

These increases are the result of large increases in acreage planted and favorable weather. Acreage of tobacco increased from 217 thousand acres in 1953 to 264 thousand acres in 1954, a much larger increase than had been previously estimated. The increased plantings reflect the improved picture of Greek tobacco sales and prices.

### Algeria Establishes a Tobacco Export Incentive Plan

The American Consul General at Algiers reports that the Algerian Government has passed a law subsidizing exports. Eligible products are divided into two groups. The first group gets automatic subsidies at fixed rates. The second group is subsidized on a case basis. Leaf tobacco is in the second group.

Exports of leaf tobacco during the years 1948-50 averaged about 23 million pounds. In 1953, 27.8 million pounds were exported. The subsidy payments do not include tobacco shipped to France and French Colonies that take about 93 percent of the tobacco leaf exported. They seem to be designed to encourage the development of other markets which in the past have taken only 7 percent of total tobacco leaf exported.

### Indian Trade Mission to Sell Tobacco in Asia

The Government of India has sent a five-man trade mission to Southeast Asian countries with the object of finding markets for the low-grade surplus of flue-cured leaf. India has been having difficulty in disposing of the accumulated stocks of low-grade tobacco that have piled up in Guntur district during the past few years, according to the American Embassy at New Delhi.

Tobacco Stocks in Guntur District, November 30, 1953

| Where Held | Flue-Cured Virginia | Sun-Cured Virginia | Sun-Cured Country | Total |
|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds |
| Growers | | | | |
| 1953 Crop | 5,900,000 | 8,200,000 | 38,700,000 | 52,800,000 |
| Traders | | | | |
| 1952 & 1953 | 21,200,000 | 3,600,000 | 13,000,000 | 37,800,000 |
| Total | 27,100,000 | 11,800,000 | 51,700,000 | 90,600,000 |

Source: Embassy Report

Estimates place the stocks of "problem" tobacco at about 32 million pounds. The trade mission will try to dispose of this through expanding old markets and developing new ones. They also plan to take samples of Indian manufactured cigarettes to distribute to any persons who might be interested. Countries to be visited include: China, Japan, Thailand, Malayan States, Indonesia, and Hong Kong.

## Ecuador Has Contraband Problem in Cigarettes

It has been reported that the State Monopoly of Ecuador had a loss in sales of 1 million packs of imported cigarettes during 1953. This has been blamed on the high Monopoly prices of 6.5 to 7 sucres (43-46 cents U. S. per pack), which has encouraged and made profitable a contraband trade.

The National Economic Council has approved an emergency law which would reduce the price of foreign cigarettes about 13 U. S. cents per pack, which would lower the price to 30 U. S. cents for standard brands and 33 U. S. cents for King size. Both the National Congress and the President have hesitated to reduce these cigarette taxes as they were levied expressly to provide additional education facilities. It appears now that some action must be taken to reduce the margin of profit in the contraband trade and thus curb it.

## Iran Offers Oriental Cigarette Tobacco

The Iranian Tobacco Monopoly has informed the United States Embassy that it is interested in selling approximately 13.2 million pounds of tobacco in the United States. This tobacco is 1953 crop, oriental type leaf, unstemmed cigarette tobacco. Monopoly specialists claim these are neutral tobaccos and can be mixed in virtually any proportion with other varieties without changing the taste and quality of the cigarette.

The crop will be graded in September and the Monopoly could grade the tobacco in accordance with American standards if American buyers are interested. Prices range from 9 U. S. cents per pound for the lowest grade to 50 U. S. cents per pound for the top grade f.o.b. Persian Gulf Port.

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WASHINGTON, D.C.

FT 27-54

August 10, 1954

## FOREIGN OPERATIONS ADMINISTRATION APPROVES SECTION 550 FUNDS FOR PURCHASE OF UNITED STATES LEAF TOBACCO BY FORMOSA

Foreign Operations Administration has authorized Formosa to buy flue-cured tobacco valued at $100,000 under Section 550 of the Mutual Security Act of 1953. The Taiwan (Formosa) Tobacco and Wine Monopoly Bureau, 4 Nanchang Road, Taipei, Taiwan is interested in receiving bids from leaf suppliers who are in a position to select and redry the quantities of tobacco needed. They wish to purchase the following grades and quantities of flue-cured tobacco:

| | 1953 Crop | | | 1952 Crop | |
|---|---|---|---|---|---|
| B2F | 22,000 | Pounds | B4F | 159,000 | Pounds |
| B3F | 22,000 | " | B42 | 40,000 | " |
| B2L | 22,000 | " | | | |
| C2L | 33,000 | " | | | |
| C3L | 33,000 | " | | | |

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# TOBACCO PRODUCTION AND TRADE IN MADAGASCAR 1/

By James W. Birkhead

## Summary

Most of domestic production of leaf is of the Maryland type with only a small amount of dark air-cured (Corse'). Output of Maryland has been increasing in recent years and has ranged from 8.4 to 9.0 million pounds in the last three years. Only a small portion of the Maryland leaf is used for production of tobacco products in Madagascar with most of the output exported to France. Most of the Corse' is consumed in Madagascar. Many years ago, relatively large amounts (6-7 million pounds annually) of Maryland leaf produced in the United States were exported to France, but the increase in output in Madagascar has completely displaced U. S. outlet for this type in the French markets.

The cost of production is fairly high and the level of output is not expected to change materially in the near future. Production, exports, imports, and manufacturing are closely controlled by the French Tobacco Monopoly. The Monopoly has refused to grant approval for increasing tobacco production in Madagascar. The Regie Metropolitaine (French Monopoly) has indicated that they do not plan to purchase more than a maximum of 11 million pounds of tobacco annually from Madagascar and that the upper limit of production in Madagascar will not be more than the amount required for domestic needs plus a maximum of 11 million pounds for export unless it is demonstrated that the surplus can be sold in world market.

## Production

Native dark air-cured Corse' tobacco is cultivated chiefly on the high plateau in the districts of Ameby, Ambatolampy and Ambatondrazaka, but some is also produced on the European concession lands. Most of the Maryland leaf is produced in the provinces of Tulears, Majunga, and Tananarive. It is concentrated in the Valleys of the Tsiribihina and Betsibaka Rivers and their tributaries near the west coast, but some is also grown near Majunga (Ambato-Boeni, Maevatanana, and Port Berge areas) in the northwest section of the island as

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1/ The author has recently returned from a trip through Africa and Brazil, where he studied tobacco production and trade. This is one of a series of reports, which also includes Northern Rhodesia, Southern Rhodesia, Nyasaland, British East Africa, Union of South Africa, Mozambique (Portuguese East Africa), Belgian Congo, and Brazil.

well as in the Itasy district (west of Tananarive on the Central plateau) and in part of the Ambatondrazaka district of the Lac Alaotra region. Most of the Maryland leaf is produced by native sharecroppers working on plantations (concessions) operated by the French.

Madagascar tobacco production in 1953 by provinces

| Provinces | Acreage | Amounts |
|---|---|---|
| | Acres | 1,000 pounds |
| Tuleares | 10,171 | 4,585 |
| Majunga | 6,040 | 3,277 |
| Tananarive | 2,797 | 1,396 |
| Finanarantsoa | 371 | 264 |
| Tamatave | 74 | 110 |
| Total | 19,453 | 9,632 |

Madagascar: Acreage, yield, and production of leaf tobacco by kind

| Period | Acreage | Average Yield per Acre | Production | | |
|---|---|---|---|---|---|
| | | | Maryland | Dark | Total |
| | Acres | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Average: | | | | | |
| 1935-39 | 19,000 | 764 | 1/ | 1/ | 14,164 |
| 1940-44 | 8,396 | 449 | 2,553 | 1,438 | 3,991 |
| Annual: | | | | | |
| 1945 | 9,884 | 445 | 3,371 | 1,023 | 4,394 |
| 1946 | 7,413 | 535 | 3,431 | 831 | 4,262 |
| 1947 | 4,942 | 892 | 3,307 | 1,102 | 4,409 |
| 1948 | 5,578 | 581 | 2,523 | 720 | 3,243 |
| 1949 | 15,106 | 611 | 1/ | 1/ | 9,228 |
| 1950 | 19,397 | 524 | 1/ | 1/ | 10,174 |
| 1951 | 13,108 | 679 | 1/ | 1/ | 8,907 |
| 1952 | 20,287 | 518 | 1/ | 1/ | 10,509 |
| 1953 | 19,435 | 496 | 8,585 | 1,047 | 9,632 |
| 1954 2/ | 19,521 | 446 | 8,377 | 331 | 8,708 |

1/ Not available.
2/ Preliminary.

Source: International Institute of Agriculture and reports from U.S. Foreign Service Officers.

"Official Estimates" of production are based largely on purchases by the purchasing mission. Actual production is believed to exceed "official estimates" by about 10 percent. Approximately 1.2 million pounds of Corse' are estimated as sold through illegal channels in 1953. Only the better grades of Maryland are purchased, with the remainder reportedly burned; however, it is believed that some of the leaf not purchased by the Monopoly is sold locally, even though it is not offered for sale to the Monopoly.

On the High Plateau, tobacco is transplanted in January and June; on the west coast - April-June; and in the northwest section - June-July.

About 80 percent of the Maryland type is produced by sharecroppers. The native family produces an average of about 650 to 750 pounds of leaf. The French plantation operator furnishes the land, machinery and equipment and prepares the land. He usually maintains a store on the concession, often extends credit, provides crop loans, and has the exclusive right to purchase the crops produced. The prices paid for tobacco produced by sharecroppers are based on the prices received by independent natives selling directly to the Monopoly. Native labor is not efficient, but as long as the Monopoly is willing to establish prices paid to producers on the basis of estimated cost of production rather than world prices, there will continue to be a lack of interest on the part of the concession operator in striving for efficiency.

Average yields of Maryland are reported as about 875 pounds per acre on European plantations and 700 pounds per acre on the plots grown by independent natives. Much of the Maryland tobacco is grown on alluvial sand in the river basins. Fertility of the soil has been deteriorating for some time in the Tisiribishina valley as the overflows have been stopped or reduced by preventive measures. Although, presently, farmers usually do not use fertilizer, it will be necessary to apply fertilizer, if yields are to be maintained or improved.

Maryland tobacco is not redried, but is fermented, usually being bulked and rebulked four or five times, although it is sometimes rebulked eight or nine times. It is often necessary to open the bulks and rebulk several times in order to avoid excessive heat that would otherwise damage the tobacco. The French have become accustomed to the particular flavor of fermented Maryland tobacco and this process will likely continue. However, the leaf might be more efficiently handled through redrying and packing as is done in other areas. The loss in weight in fermentation is estimated at between 3 and 4 percent.

After the leaf is sorted and tied into hands, it is fermented and packed (baled). Leaf purchased from "independent" natives may be graded by the Europeans or the purchasing mission of the French Monopoly, who purchase it. Tobacco purchased by the mission may be regraded, fermented, and baled, if these processes have not previously been carried out. This is done in small stores or warehouses throughout the producing areas. Frequently, it is impossible to transport tobacco to the coast until several months after it is harvested, as the roads are often flooded in the rainy season. There are few roads and they are not very good; thus, transportation is very difficult and expensive. Some tobacco is flown by plane from the interior to the west coast.

The cost of production is seemingly very high and labor is not as readily available from the southern and eastern part of the island as in the past. Coffee and sisal production have expanded in these areas; thus, requiring the retention of more labor.

Maryland seeds were imported from the United States a couple of years ago and the local director of the Monopoly said that the tobacco produced from these seeds was almost identical with that grown from varieties that had been acclimated in Madagascar for several years. On the basis of observing only a few samples of each, there seemed to be very little difference between the two.

Some articles written on the Maryland tobacco produced in Madagascar have indicated that this leaf was much heavier and darker with a higher nicotine content than Maryland leaf produced in the United States. The leaf observed was of good quality and its physical characteristics before it was fermented were much like the leaf grown in the United States. After it is fermented, it appears much different from U. S. leaf or the Madagascar leaf prior to fermentation.

Some Virginia (flue-cured), Burley and Kentucky dark tobaccos have been produced in the Lake Alatora district along the north coast. There has been considerable discussion about the production of flue-cured tobacco in Madagascar, but it is doubtful that very much will be produced at least in the next few years Some flue-cured leaf is being produced on Reunion Island as well as in the French areas of Africa and if production is expanded in French territories, it is more likely to be in these areas rather than in Madagascar.

## Prices

Actual prices paid for leaf tobacco are difficult to determine. The European is paid established prices by grades for fermented and baled leaf. Also, the European purchases dried leaf from the native, which is then fermented and baled before sale to the Monopoly. In addition, there is a faithfulness bonus paid to producers depending on the length of time they have been growing tobacco and, in certain cases, there are quality bonuses for leaf above the minimum grade standards.

The prices paid for tobacco in Madagascar have increased remarkedly in the last few years as the prices are based on estimated production costs rather than on the prices received for similar leaf in markets of other producing countries. There are probably some other French areas, which could produce tobacco more efficiently and at a lower cost than Madagascar.

Detailed prices by grades are given only for the 1950 and 1951 crops as these are the latest available. Only the average prices are shown for the 1952 and 1953 crops.

Changes in value of the franc through deflations introduce some error into comparison of prices by periods, but there has been a very large increase in prices paid for unmanufactured tobacco in recent years. Quality of leaf produced has improved, but this accounts for only a small proportion of the rise in prices. The change has largely resulted from inflation and claims of increasing costs by the European plantation operators.

Average prices received in 1953 by producers for unmanufactured leaf tobacco

| Type | C.F.A. Francs per pound | U.S. Cents per pound 1/ |
|---|---|---|
| Maryland: | | |
| Fermented and baled | 136.4 | 77.9 |
| Dried but not fermented and baled | 40.9 | 23.4 |
| Corse': | | |
| Fermented and baled | 65.9 | 37.7 |
| Dried but not fermented and baled | 30.9 | 17.7 |

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1/ Francs converted to U.S. currency on the basis of 175 CFA equivalent to $1.00 U.S.

Prices paid to European growers for the 1950 and 1951 crops of fermented Maryland leaf (exclusive of faithfulness bonus) 1/

| Grade | First Length | | Second Length | |
|---|---|---|---|---|
| | 1950 | 1951 | 1950 | 1951 |
| | U.S.Cents per pound 2/ | U.S. Cents per pound 2/ | U. S. Cents per pound 2/ | U. S. Cents per pound 2/ |
| CSS | 46.7 | 58.6 | 42.0 | 52.9 |
| CS | 42.0 | 52.9 | 37.3 | 46.9 |
| C | 32.7 | 43.0 | 29.5 | 39.1 |
| FS | 37.3 | 43.0 | 33.7 | 39.1 |
| F | 28.0 | 35.3 | 24.9 | 31.4 |
| FV | 18.7 | 23.3 | 17.1 | 21.0 |
| FR | 15.6 | 19.4 | 14.0 | 17.4 |

1/ Prices above exclude a faithfulness bonus of 20 francs per kilo (5.2 U.S. Cents per pound) for growers who have been producing tobacco for more than a specified minimum number of years.

2/ Converted to U.S. Cents on the basis of 175 CFA equivalent to $1.00 U. S.

Prices paid to native producers for the 1950 and 1951 crops of non-fermented Maryland tobacco (exclusive of faithfulness bonus) 1/

| Grades | 1950 | 1951 |
|---|---|---|
| | U.S. Cents per pound 2/ | U. S. Cents per pound 2/ |
| First choice extra | 31.9 | 44.1 |
| First choice | 23.8 | 35.0 |
| First quality | 19.4 | 27.2 |
| Second quality | 15.6 | 20.7 |
| Third quality | 11.1 | 15.6 |

1/ There is a faithfulness bonus of 2.6 U.S. cents per pound and a quality bonus ranging from 1.1 to 4.6 U.S. cents per pound.

2/ Colonial Francs converted to U. S. currency on the basis of 175 CFA equivalent to $1.00 U. S.

The average prices received for Maryland leaf increased from less than 3 cents per pound in 1939 to more than 75 cents per pound in 1953.

Average prices received by producers for Maryland type tobacco

| Year | CFA per Kilo | U.S.Cents per pound 1/ |
|---|---|---|
| 1936 | 4 | 1.0 |
| 1939 | 8 | 2.1 |
| 1946 | 103 | 26.9 |
| 1947 | 170 | 45.7 |
| 1952 | 295 | 76.5 |
| 1953 | 300 | 77.9 |

1/ Colonial Francs converted to U.S. currency on the basis of 175 CFA equivalent to $1.00 U.S. Actually, there was considerable deflation of the Franc, particularly in September of 1949.

Source: Journal de Madagascar - Jan. 1953 and reports from U.S. Foreign Service

Prices paid to producers for the 1950 and 1951 crops of dark air-cured Corse' (exclusive of quality bonus 1/

| Grades | Prices paid to Europeans for fermented Corse' | | Prices paid to natives for dried, unfermented Corse' | |
|---|---|---|---|---|
| | 1950 | 1951 | 1950 | 1951 |
| | U.S.Cents per pound 2/ | U.S.Cents per pound 2/ | U.S. Cents per pound 2/ | U.S. Cents per pound 2/ |
| First grade | 30.1 | 41.5 | - | - |
| Second grade | 24.1 | 33.7 | - | - |
| First choice | - | - | 19.2 | 27.2 |
| First quality | - | - | 15.6 | 22.0 |
| Second quality | - | - | 11.4 | 16.3 |
| Third quality | - | - | - | 10.4 |

1/ There is a quality bonus ranging from 1.0 to 4.1 U.S. Cents per pound.
2/ Colonial Francs converted to U.S. currency on the basis of 175 CFA to $1.00 U.S.

Exports of Unmanufactured Tobacco

Practically all of the Maryland leaf is exported to France and in some years some Corse' is exported. In the last three years, the amounts taken by France have ranged from 7.6 to 9.6 million pounds annually. In 1951 and 1953 small amounts were exported to Reunion, a nearby island, which is also French territory. Only the better grades are purchased for export with the lower quality leaf sold to domestic manufacturers.

There is a tax on leaf exported and while the rate is not known, it would appear (based on the quantities exported and the revenue collected) that the rate is equivalent to about 6.5 U.S. cents per pound.

Exports of unmanufactured tobacco by country of destination, 1935-53

| Year | France | Reunion | Other | Totals |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1935-39 | 5,262 | - | - | 5,262 |
| 1940-44 | 1/ 678 | - | 2/ 440 | 1,118 |
| 1945 | 2,547 | - | - | 2,547 |
| 1946 | 2,351 | - | - | 2,351 |
| 1947 | 3,115 | - | - | 3,115 |
| 1948 | - | - | - | - |
| 1949 | 4,251 | - | - | 4,251 |
| 1950 | 6,283 | - | - | 6,283 |
| 1951 | 9,474 | 123 | - | 9,597 |
| 1952 | 7,595 | - | - | 7,595 |
| 1953 | 9,006 | 110 | 2 | 9,118 |

1/ Includes data for 1941 and 1942 only.
2/ Includes 2,202,000 pounds shipped to Algeria in 1944.
Source: Statistique du Commerce et de la Navigacion, and Bulletins de Statistique Generale de Madagascar et Dependances, 1953.

Imports of leaf tobacco by France from Madagascar (in thousand pounds)

| Averages | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| 1935-39 | 1940-44 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
| 4,809 | - | 3,202 | 3,002 | 3,095 | 1,541 | 8,338 | 3,510 | 7,600 | 7,389 | 6,672 1/ |

1/ Preliminary
Source: Tableau General du Commerce Exterieur. France

State Controls in the Tobacco Industry

Since 1932, the Government has regulated the methods of cultivation, manufacture and sale of tobacco on Madagascar. The Governor General designates the areas in which tobacco can be grown. A person wishing to produce tobacco submits a declaration including the proposed location and area to be devoted to tobacco. If approved, the prospective producer is issued the permit required.

All tobacco for manufacture is sold to the Purchasing Mission of the French Monopoly, who sells it to the local manufacturer or handles the leaf for export. The Mission resells the local factories the fermented leaf required. There is a tax on this leaf which, reportedly, is to be used to improve the production of tobacco. The Madagascar manufacturer sells the products to the General Sales Comptroller for Tobacco (Comptoir General d'Achat et de vente des Tabac), which, in turn, resells the products to the wholesaler. Wholesalers are allowed a profit of 3 to 4 percent. Imported products as well as those manufactured locally are handled through this organization. The Sales Office fixes the prices of products to the consumer by multiplying the cost price of the product plus the consumption tax by 125 percent to 200 percent depending on the quality of the product. The retailer is permitted a 14 percent gross margin on smoking tobacco and a 17 percent on chewing tobacco.

With a mark-up of 25 to 100 percent by the General Sales Office and a margin of 3.5 percent by the wholesaler and about 15 percent by the retailer, it is obvious that profits of the General Sales Office are substantial.

Imports of Leaf Tobacco

Usually no leaf tobacco is imported, but in 1950 about 66,000 pounds were taken from Mauritus and in 1951 about 14,000 pounds were taken from the United States and 30,000 pounds from the Netherlands. No imports have been reported since that time.

Imports of Manufactured Products

Large quantities of cigarettes manufactured in Algeria and France are imported, even though larger quantities could be produced on Madagascar. Small amounts are imported from other areas, principally the United Kingdom. In recent years, increasing quantities of smoking tobacco have also been imported from Algeria and France.

The amounts of cigarettes reported as imported into Madagascar from France are consistently much greater than the quantities reported in French Export Statistics. The amounts of tobacco products smuggled into Madagascar are believed to be fairly great. Official imports reported for Madagascar are shown in the table below.

Madagascar: Imports of manufactured tobacco products by country of origin

| | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | | | | | |
| Cigars and Cigarettes | | | | | | | | | | |
| France | - | - | - | - | - | 41 | 27 | 168 | 164 | 214 |
| Algeria | 1 | - | - | - | 69 | 290 | 137 | 952 | 659 | 581 |
| U. of South Africa | 11 | 87 | 157 | 158 | 31 | 1/ | - | - | - | - |
| United States | - | - | 48 | 61 | 242 | 1/ | - | 1/ | 1/ | - |
| Other Countries | 22 | 4 | 10 | 2 | 29 | 15 | 23 | 2 | 5 | 23 |
| Total | 34 | 91 | 215 | 221 | 371 | 346 | 187 | 1,122 | 828 | 818 |
| Smoking Tobacco | | | | | | | | | | |
| France | - | - | - | - | - | - | - | 12 | 24 | 37 |
| Algeria | - | - | - | - | - | - | - | 49 | 11 | 74 |
| Other Countries | - | - | - | - | - | - | - | - | 1/ | - |
| Total | - | - | - | - | - | - | - | 61 | 35 | 111 |
| Other | | | | | | | | | | |
| France | - | - | - | - | - | 5 | - | - | - | 6 |
| Algeria | 1/ | - | - | - | 1 | 4 | - | - | - | 1 |
| Other Countries | 1 | 1/ | 1 | 1 | 1 | 1 | - | - | - | - |
| Total | 1 | 1/ | 1 | 1 | 2 | 10 | - | - | - | 7 |
| Grand Total | 35 | 91 | 216 | 222 | 373 | 356 | 187 | 1,183 | 857 | 936 |

1/ Less than 500
Source: Statistique du Commerce et de la Navigacion - Madagascar, and Reports from U. S. Foreign Service Officers.

While no official data are readily available for 1952, imports of manufactured products are estimated to have been 1.2 million pounds in 1953 (based on actual imports in the first 11 months of 1953).

## Exports of Tobacco Products

Only very limited quantities of tobacco products are exported. Most of such shipments are sent to Reunion.

## Use of Madagascar Tobacco

Most of the Maryland leaf imported by France is reported as used in cigarettes and cigars.

The dark air-cured (Corse') is chiefly consumed by the natives of Madagascar in the form of smoking tobacco, snuff, and chewing tobacco, with some in strong cigarettes. In the preparation of snuff, the leaf is toasted and powdered with "Ambiato" or "Cevalie" ashes added. As much as 30 to 50 percent of the snuff is made up of these ashes which release the nicotine when moistened by holding it under the tongue.

Total consumption of tobacco products on Madagascar is estimated at approximately 4 million pounds annually of which about 1.2 million pounds are secured from products processed and sold "unofficially." Chewing tobacco and snuff account for the largest amount of consumption, followed by cigarettes and smoking tobacco. Consumption in the form of cigarettes and smoking tobacco has been rising rapidly, while use of chewing tobacco and snuff is believed to have remained about constant or declined slightly in recent years. "Official" manufacture and sales of chewing tobacco and snuff have increased as control measures have been strengthened, but "unofficial" consumption is large, although the exact amount is not known.

In 1953, it is estimated that 1.5 million pounds of Corse' and 139,000 pounds of Maryland were used "officially" in the manufacture of tobacco products in Madagascar, with perhaps an additional 1.2 million pounds of leaf processed and sold "unofficially." An additional 1.2 million pounds of products, mostly cigarettes, were imported.

Controlled consumption of tobacco products, Madagascar, (exclusive of illegal sales) 1/

| Kind | Period | | | |
|---|---|---|---|---|
| | 1950 | 1951 | 1952 | 1953 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Chewing and snuff | 1,143.1 | 1,168.0 | 3/ | 3/ |
| Cigarettes | 2/ 720.2 | 852.1 | 3/ | 3/ |
| Smoking tobacco | 149.4 | 233.4 | 3/ | 3/ |
| Cigars | 2/ | .7 | 3/ | 3/ |
| Total | 2,012.7 | 2,254.2 | 4/ 2,550 | 2,850 |

1/ Illegal sales mostly of chewing tobacco and snuff made from Corse' are estimated at 1.2 million pounds annually.
2/ Cigars included with cigarettes.
3/ Not available.
4/ Estimated by adding estimated imports to official domestic production.

## Consumption Tax

Since 1938, there has been no custom on tobacco imports, but there is a consumption or excise tax on all manufactured tobacco products regardless of the source. These taxes in 1951, which are the latest readily available, are indicated in the table below.

| Kind | CFA per Kilo | U.S. Cents per pound 1/ |
|---|---|---|
| | Francs | Cents |
| Cigarettes | 700 | 2/ 181.8 |
| Cigars | 700 | 181.8 |
| Smoking Tobacco | 350 | 90.9 |
| Chewing and snuff | 70 | 18.2 |

1/ CFA francs converted to U.S. currency on the basis of 175 CFA equivalent to 1.00 U.S.
2/ Equivalent to about 9.1 U.S. Cents per pack of 20 cigarettes.

Profits of the General Sales Office, export tax on leaf shipments and the tobacco consumption or excise tax account for a high proportion of the revenue accruing to the Government of Madagascar.

# FOREIGN AGRICULTURE CIRCULAR

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## TOBACCO PRODUCTION AND TRADE
## UNION OF SOUTH AFRICA [1]

By James W. Birkhead

### Summary

Most of the production is flue-cured and dark air-cured with some light air-cured and Turkish, and in the last couple of years a little dark fire-cured. The light air-cured includes some red Burley. The 1953-54 crop (harvested January-April 1954) is estimated at 20.2 million pounds of flue-cured, 400,000 pounds of Burley, 2.03 million pounds of other light air-cured, 15.8 million pounds of dark air-cured, 850,000 pounds of Turkish and 75,000 pounds of dark fire-cured. Production of light air-cured continues its decline and flue-cured is below several previous years due to the shift from Amarello to Orinoco. This shift was completed with the 1952-53 crop. The Orinoco is of a good, yellow color, much heavier-bodied than U. S. leaf, good texture and fair aroma.

The quality of this leaf is acceptable in several Western European markets and exports to these areas may be increased, if offered at competitive world prices. The export program has been aided through a system of export bonuses, and the importation of duty-free leaf from Northern and Southern Rhodesia has been used to establish and maintain export markets in a period when domestic production was not sufficient to meet domestic needs, at the same time permit the levels of exports desired.

Domestic consumption of pipe tobacco is increasing, and greater proportions of dark air-cured are being substituted for light air-cured in the mixtures; thus, increasing the quantities of this kind of leaf used.

Imports largely of flue-cured from Southern Rhodesia, Northern Rhodesia, and the United States have declined sharply in the last couple of years and are expected to decline further as domestic production expands.

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[1] The author has recently returned from a trip through Africa and Brazil, where he studied tobacco production and trade. This is one of a series of reports, which also includes Southern Rhodesia, Northern Rhodesia, Nyasaland, British East Africa, Madagascar, Mozambique (Portuguese East Africa), Belgian Congo, and Brazil.

## Tobacco Industry Control Board

The production, marketing, and export of tobacco is under the jurisdiction of the Tobacco Industry Control Board, which was established in April 1939. This board is composed of 16 members - 10 representing producers, 4 manufacturers, 1 distributive trade, and 1 government.

Domestic manufacturers as well as buyers for export may purchase leaf only through agents appointed by the Board. The Board, with approval of the Ministry of Agriculture, prescribes grades and fixes the prices to producers as well as to manufacturers. Also, the Board, through the use of permits, regulates imports as well as exports.

## Marketing

The leaf is sold by the producer only to the cooperatives, which grade, redry, pack, and sell through appointed agents to the manufacturer or exporter. There are six area redrying and packing plants, but the MKTG Cooperative at Rustinburg is by far the largest, handling about 60 percent of all tobacco produced in the Union. Turkish is handled entirely by the Westlike Provinsie Kooperatiewe, Zuider (South) Paarl. The coops regrade the leaf about three times and the resulting grades are relatively uniform in quality. Tobacco is frequently purchased by grade without the buyer seeing the leaf as the coops have a good reputation for standard grades. Green colored leaf is separated by coop graders and placed in large bulks to bleach out the green before it is sold to manufacturers. The bleaching requires that the leaf remain in the bulk for some time and coop officials think that the present method may be more elaborate than required to turn out an acceptable product. Flue-cured, for domestic use, is sold in 250-pound bales and dark air-cured in 260-pound bales. Most of that exported is packed in boxes or hogsheads containing about 400 pounds of tobacco.

Each domestic manufacturer estimates his total requirements prior to the tobacco harvest. If he needs 10 percent of the total flue-cured produced, he is required by the Tobacco Industry Control Board to purchase 10 percent of each grade of flue-cured in that particular crop.

## Producing Areas

Principal producing areas are in the Magaliesburg area of the Transvaal (Rustenburg, Brits, Marico, Pretoria, Waterburg, Krugersdorp, and Gablersdal) Porgietersrust area, Vaal river area (Uredefort, Potchefstroom, and Klerksdorp) Piet Retief, Barberton, Kat River, Gamtoos River, Oudtshoorn; Coast areas of Nepal (North of Durbin and West of Tongaat and Umlalazi); two areas in the Cape Province (Northeast area around Usikiski and Flagstaff, and along the Kamanassie river near Avuntuur); and in a limited area in the Orange Free State.

In the Western Cape Province and part of Natal, natural rainfall is adequate for tobacco growing, but most of the production is from irrigated land.

Union of South Africa: Production of leaf tobacco by kind

| Year | Flue-Cured Orinoco | Flue-Cured Amarello | Dark 1/ Air-Cured | Light 2/ Air-Cured | Turkish |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1935-39 | - | 2,715 | 20,882 | 3/ | 775 |
| 1940-44 | - | 10,046 | 18,123 | 3/ | 470 |
| 1944-45 | - | 13,774 | 18,034 | 3/ | 786 |
| 1945-46 | - | 12,982 | 16,127 | 3/ | 547 |
| 1946-47 | - | 19,723 | 19,079 | 3/ | 912 |
| 1947-48 | - | 22,045 | 26,721 | 3/ | 868 |
| 1948-49 | - | 23,256 | 10,687 | 10,941 | 669 |
| 1949-50 | - | 22,108 | 13,802 | 12,167 | 743 |
| 1950-51 | 2,953 | 19,990 | 17,972 | 12,912 | 1,360 |
| 1951-52 | 14,572 | 2,734 | 18,471 | 7,371 | 1,012 |
| 1952-53 | 12,563 | - | 21,553 | 3,700 | 1,000 |
| 1953-54 4/ | 20,187 | - | 16,155 | 2,433 | 850 |

1/ Includes some dark fire-cured in the last few years.
2/ Includes Burley.
3/ Included in dark air-cured.
4/ Preliminary.
Source: FAS records and a report of Tobacco Industry Control Board for year ended April, 1953.

Flue-Cured Production

Flue-cured, as well as other types, is produced by growing small acreages per farm as in the United States. Nearly all of the flue-cured is grown in the Transvaal Province. It is concentrated in the valleys of the Brits, Rustenburg, and Pretoria districts.

The seedbeds are planted in August; transplanting is done in the October-December period with harvest in January-April. Deliveries of leaf to the coops may begin as early as January 15.

The 1953-54 flue-cured crop is estimated at 20.2 million pounds. This is a substantial increase over the 12.6 million in 1952-53, but smaller than any recent crops, except those of 1951-52 and 1946-47. The small production in 1951-52 and 1952-53 was largely due to a shift from Amarello to the lower yielding Orinoco without sufficiently increasing the acreage of Orinoco to offset lower yields. Also, there was hail damage in the fall of 1952. The shift from Amarello to Orinoco was done in response to changing domestic consumer tastes as well as in an effort to increase exports, which could only be accomplished if Orinoco were available. There is no demand for Amarello on major world markets.

Most of the flue-cured is produced in river valleys of the Transvaal on red clay or dark sandy loam soils that are irrigated. Most producers apply 600 to 800 pounds of fertilizer per acre, usually of a 2-6-12 mixture or close approximation of this proportion of plant nutrients.

Union of South Africa: Grades and average prices received by farmers per pound of tobacco by type of leaf

| | Flue-Cured | | Air-Cured | | |
|---|---|---|---|---|---|
| Year 1/ | Orinoco | Amarello | Light | Dark | Turkish |
| | U. S. Cents 2/ | U. S. Cents 2/ | U. S. Cents 2/ | U. S. Cents 2/ | U. S. Cents 2/ |
| 1940-44 | - | 26.0 | 18.0 | 11.0 | 28.0 |
| 1944-45 | - | 33.3 | 24.3 | 14.8 | 42.2 |
| 1945-46 | - | 32.5 | 27.6 | 15.4 | 44.1 |
| 1946-47 | - | 37.8 | 28.3 | 16.8 | 45.6 |
| 1947-48 | - | 40.0 | 34.2 | 21.1 | 45.0 |
| 1948-49 | - | 39.7 | 30.8 | 19.6 | 44.4 |
| 1949-50 | - | 39.8 | 34.7 | 20.3 | 45.5 |
| 1950-51 | - | 42.8 | 33.4 | 20.1 | 46.6 |
| 1951-52 | 50.9 | 41.7 | 31.6 | 20.5 | 46.4 |
| 1952-53 | 48.5 | 46.0 | 34.2 | 20.8 | 47.0 |

1/ Marketing year, April 1 - March 31.
2/ Converted to U. S. Cents on the basis of 1 South African Pound equivalent to $2.80.

## Quality of Flue-Cured

The Orinoco is of a bright, yellow color, considerably heavier in body than U. S. flue-cured, and has good texture and fairly good aroma. The average quality of flue-cured in the Union of South Africa is much higher than the quality of flue-cured produced in other areas of Africa. This year nondescript leaf is not being marketed in the Union.

Amarello is similar to the red Burley formerly produced in the United States. Some Amarello is air-cured and used in smoking and chewing tobacco mixtures.

## Prices

Prices for flue-cured have been increased substantially in recent years, while the levels for other kinds have remained constant for the past four years. Since 1950, the prices by grades for all flue-cured have been increased with a 33 1/3 percent premium for Orinoco in 1951 and a 37 1/2 percent bonus in 1952. The differential for Orinoco is continuing.

## Outlook for Flue-Cured

The Tobacco Industry Control Board hopes to increase the production of Orinoco by about two million pounds per year over the next few years. The Board expects the rate of increase to be somewhat greater than the increase in domestic consumption; thus, providing larger amounts for export.

Exports are likely to increase with prices likely to be an important factor in levels achieved. Prices paid to producers may have to be raised in order to substantially increase output. Presently, 90 percent of the flue-cured is grown in the Rustenburg Valley. Available land is not unlimited and returns from some competing crops make for keen competition for suitable land.

Dark Air-Cured

Dark air-cured is produced in many districts of the Northern and Southeastern Transvaal, in Nepal just North of Durbin and West of Tongaat, in the Orange Free State, and one area in the Cape province. Very little cigar tobacco is produced, but a limited amount is grown in Natal. Dark leaf as well as some light air-cured is produced in the British Protectorate of Swaziland. Production of dark air-cured is also reported in Bechuanaland and Basutoland, but the amounts are not readily available. Although these are British protectorates, commercial shipment, packing, manufacturing, and exports of leaf from these areas are handled through usual trade channels in the Union.

The output of dark air-cured leaf has expanded substantially in recent years. This has been done largely in response to the demand for pipe tobacco, especially by the natives as well as whites of Dutch extraction. Increasing amounts of dark air-cured are being substituted for light air-cured in the pipe mixtures.

Swaziland: Production of leaf tobacco

| Year | European | Native | Total |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1937 | 174 | 14 | 188 |
| 1938 | 299 | 23 | 322 |
| 1939 | 361 | 40 | 401 |
| 1940 | 384 | 40 | 424 |
| 1941 | 293 | 51 | 344 |
| 1942 | 267 | 25 | 292 |
| 1943 | 523 | 57 | 580 |
| 1944 | 290 | 62 | 352 |
| 1945 | 362 | 73 | 435 |
| 1946 | 242 | 46 | 288 |
| 1947 | 336 | 88 | 424 |
| 1948 | 515 | 100 | 615 |
| 1949 | 1/ | 1/ | 1/ |
| 1950 | 1/ | 1/ | 1/ |
| 1951 | 1/ | 1/ | 412 |

1/ Not available.
Source: Swaziland Livestock and Agricultural Department: - Annual Report 1948 for data for 1937-48 and U.S. Foreign Service Report for 1951 information.

The 1953-54 crop of dark air-cured is estimated at about 16 million pounds, of which 12 million is pipe tobacco, 3 million snuff, and about 1 million pounds of roll and twist. The Union has just recently begun to produce dark fire-cured. This is being done to some extent to meet increased demands by natives in the Union, but probably chiefly in an effort to expand exports to the protectorate of South West Africa..

Prices received by farmers for dark air-cured remained at almost a constant level for the crops of 1949-50 through 1952-53, averaging approximately 20.5 U. S. cents per pound. The decline in 1953-54 production is believed to be largely due to the price of this kind of tobacco being less favorable than the prices received for competing crops.

The bulk of dark air-cured leaf is used in fermented Cavendish types of smoking tobacco. This product is processed in a rather unusual manner. The hands of leaf are dipped in vats of water and placed in large bulks to ferment for about two days. The leaf is then cut and taken into the sun, where it is left for about a week, being stirred and turned daily until the moisture content has been reduced to the proper level. Amarello (either flue-cured or air-cured) is used in some pipe mixtures.

## Light Air-Cured

Light air-cured production in 1953-54 was estimated at only 2.4 million pounds. This is the lowest level in more than ten years. Production of light air-cured leaf was not reported separately prior to the 1948-49 period, but consumption data for this kind of tobacco are available prior to this date. The 1953-54 output of light air-cured includes about 400,000 pounds of red Burley. Actually, some of the leaf reported as light air-cured is about as dark and heavy as is our dark air-cured. In the period 1942-1950, the consumption of light air-cured ranged from about 7 to 9.2 million pounds (redried weight) annually. Production increased to about 12 million pounds in 1949-50 and 1950-51, then declined sharply. The decline is largely due to a decrease in demand for this kind of leaf in pipe mixtures, as more dark air-cured is being substituted for light in smoking mixtures. The decline was probably accentuated by relatively more favorable prices for competing crops.

## Outlook

The production of Burley is likely to increase, but production of other light air-cured will probably remain low.

## Dark Fire-Cured

The production of fire-cured has just been started with only about 75,000 pounds grown in 1953-54. Output may expand slightly, but it would not appear economical to do so in view of the prices at which such leaf can be obtained elsewhere. It would be very difficult for fire-cured grown in the Union to compete effectively with the low-cost production of Nyasaland, if there were no import duties. With the demand for food crops and alternative sources of fire-cured (particularly in a period when demand for this kind of leaf is declining), it would appear most difficult to justify an export bonus as a means of stimulating exports. However, it is too soon to predict the future of this industry as new policies may be adopted to achieve a given level of output, whether or not it is economical.

## Turkish

Turkish tobacco is grown under natural rainfall conditions in the Cape province. It is grown as a secondary crop to vegetables and fruits, especially grapes, and the relative prices of fruits and vegetables influence the plantings of Turkish, which is concentrated in the Southwestern portion Paarl district of the Cape province.

Production in the 1953-54 period is estimated at 850,000 pounds, which is less than the three preceding crops, but greater than for any other recent period, except 1946-47 and 1947-48. Consumption in 1952 was 911,000 pounds or about equivalent to production in recent years.

The selling price of Turkish is fixed by the Western Province Cooperative Tobacco Company, Limited, Zuider (South) Paarl, in consultation with buyers. This Cooperative is the only organization which handles Turkish leaf.

## Imports of Unmanufactured Tobacco 1/

Imports reached a peak in the World War II period with 6.5 million in 1943 and over 11.8 million in 1944. In 1944 more than 10.7 million pounds were taken from Southern Rhodesia. Total imports were 4.3 million pounds in 1950, 4.5 million in 1951, 2.5 million in 1952, and 2.0 million in 1953.

Most of the imports are flue-cured from Southern Rhodesia and Northern Rhodesia with small amounts from the United States, Nyasaland, and other countrie· Although most of the imports are flue-cured, some light air-cured is imported from Swaziland, the Rhodesias, and the United States (total of 206,000 pounds in 1952). Fairly large amounts (about 400,000 pounds annually) in recent years have been taken from Swaziland. About 80 percent of this is dark air-cured with the remainder light air-cured. Frequently, there are small shipments of dark leaf from Bechuanaland, the United States, and Holland -- usually cigar leaf from the latter.

Practically all of the leaf from Northern Rhodesia and a considerable portion from Southern Rhodesia have been imported duty-free under trade agreement provisions. For many years 400,000 pounds of duty-free leaf have been imported annually from Northern Rhodesia. The duty-free imports from Southern Rhodesia have varied from 10 million pounds in 1944-45 to less than one-half million, if any, in the last two years. Data as to duty paid for Southern Rhodesian leaf in the last couple of years are not readily available.

Manufacturers agreed to limit imports of dutiable leaf from the Rhodesias to not more than two million pounds in the 1952 marketing season and one million pounds in 1953. They also agreed not to import inferior grades of flue-cured at a price of less than 30 pence (35 U. S. cents) per pound. All but 300,000 pounds of the dutiable leaf imported from Southern Rhodesia in 1952 was purchased in prior years.

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1/ Data on imports by kind of tobacco and by country of origin do not agree for particular years, partly because data for protectorates are included in some cases and excluded in others. Also, there is a lag between the time that shipments pass through customs and the time that shipments are reported by the Tobacco Industry Control Board.

Union of South Africa: Imports of Unmanufactured tobacco by country of origin

| Country | 1935-39 | 1940-44 | 1945-49 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Southern Rhodesia | 2,506 | 4,550 | 3,339 | 3,623 | 3,502 | 2,605 | 1,589 |
| United States | 171 | 477 | 724 | 46 | 152 | 9 | 35 |
| Northern Rhodesia | 399 | 342 | 343 | 621 | 815 | 583 | 401 |
| Swaziland | 1/ | 2/ 320 | 347 | 752 | 2/ 335 | 396 | 2/400 |
| Nyasaland | - | 1 | 13 | 19 | 41 | 3/ | 19 |
| Other Countries | 24 | 12 | 19 | 32 | 22 | 38 | 2 |

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1/ Not readily available.
2/ Estimated on the basis of production in relation to usual domestic consumption and exports.
3/ Less than 1,000 pounds.
Source: Annual Statement of Trade and Shipping of Union of South Africa, and reports from U. S. Foreign Service Officers and Union of South Africa Tobacco Industry Control Board.

In the period 1941-49, imports from the United States were fairly large (peak shipments were 1.3 million pounds in 1941, 945,000 pounds in 1947 and 1.2 million in 1948), but declined to 9,000 pounds in 1952 and 35,000 pounds in 1953. Considerable amounts of scrap tobacco are imported from Northern Rhodesia, Nyasaland, and Southern Rhodesia.

This year (1954) imports of cigarette leaf will be about 800,000 pounds, appreciably below those of recent years. This trend will continue, if future production plans are fulfilled.

Union of South Africa: Imports of leaf tobacco by kind

| Year | Flue-Cured | Air-Cured | Turkish | Total |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1940 | 1,912 | 449 | 2 | 2,363 |
| 1941 | 1,548 | 381 | 1 | 1,930 |
| 1942 | 4,035 | 353 | - | 4,388 |
| 1943 | 5,818 | 541 | - | 6,359 |
| 1944 | 10,803 | 310 | - | 11,113 |
| 1945 | 1,351 | 367 | - | 1,718 |
| 1946 | 5,669 | 324 | - | 5,993 |
| 1947 | 6,117 | 345 | 1 | 6,463 |
| 1948 | 3,139 | 402 | 21 | 3,562 |
| 1949 | 4,461 | 632 | 45 | 5,138 |
| 1950 | 4,565 | 805 | 7 | 5,377 |
| 1951 | 4,347 | 514 | 6 | 4,867 |
| 1952 | 2,816 | 544 | 4 | 3,364 |

Source: Reports of the Tobacco Industry Control Board.

## Import Duties on Unmanufactured Tobacco

There is no duty on imports from the British Protectorates of Swaziland, Basutoland, and Bechuanaland. There is a duty of 2 shillings 9-3/5 pence (29.6 U. S. Cents) per pound on leaf from all other sources, except as provided for in agreements with Northern Rhodesia and Southern Rhodesia.

## Exports of Unmanufactured Leaf

Exports have been rising, particularly in the last four or five years even though imports have been substantial. This largely represents an effort to establish and expand outlets for flue-cured in order to have access to markets as production of Orinoco increases. There was a big increase in exports of flue-cured from 1.4 million pounds in 1951-52 to 3.5 million pounds in 1952-53. Of the flue-cured exported in the 1952-53 period, 3.2 million pounds was Orinoco and 237,409 pounds was Amarello.

The export program is influenced greatly through export bounties or premiums established by kind and grade of leaf in order to meet objectives approved by members of the Tobacco Industry Control Board. Rates of the export bounty for the 1953-54 season (April 1, 1953 - March 31, 1954) were:

1. Turkish - 5 pence (5.83 U. S. cents) per pound.
2. Flue-cured, light air-cured, and dark air-cured - up to but not exceeding 40 percent of the proclaimed minimum selling prices.

In recent years, the United Kingdom, Belgium, Netherlands, Belgian Congo, South West Africa (Union Protectorate), Israel, and Angola have taken the bulk of Union exports. In 1953, the United Kingdom greatly increased imports from the Union to over 1.5 million pounds, while shipments to Belgium, Belgian Congo, Germany, Angola, and Egypt were also expanded. The 1953 takings by Egypt were less than those of 1952, but greater than for any other year for which data are available. Although a significant percentage of shipments to the United Kingdom are flue-cured, a high proportion usually is air-cured. Much of the exports to South West Africa are heavy, dark tobacco, a considerable proportion of which is roll (processed at home by producers), chewing and smoking tobacco used primarily for consumption by the natives. Also, significant amounts of the shipments to South West Africa are scrap tobacco.

Union of South Africa: Exports of unmanufactured tobacco by country of destination

| Country | 1935-39 | 1940-44 | 1945-49 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | | |
| United Kingdom | 162 | 88 | 446 | 288 | 238 | 83 | 1,528 |
| Belgium | 148 | - | 1/ | 81 | 395 | 234 | 395 |
| South West Afr. | 159 | 143 | 278 | 213 | 2/160 | 2/ 133 | 2/ 165 |
| Br. West Afr. 3/ | 61 | 28 | 5 | 23 | 5 | - | 11 |
| Southern Rhodes | 45 | 44 | 22 | 16 | 13 | 24 | 1 |
| Australia | 1/ | 4 | 28 | 126 | 120 | 60 | - |
| Netherlands | 1/ | 1/ | 1/ | 651 | 1,577 | 435 | 273 |
| Belgian Congo | 1/ | 1/ | 174 | 445 | 251 | 201 | 964 |
| Denmark | 1/ | 1/ | 5/ 47 | - | - | 26 | 3 |
| Germany | - | - | - | - | - | 69 | 355 |
| Egypt | - | 4/ 40 | - | - | 44 | 37 | 66 |
| Port. E. Afr. | 1/ | 1/ | 2 | 14 | 45 | 75 | 50 |
| Angola | 1/ | 2 | 4 | 20 | 57 | 46 | 109 |
| Israel | 1/ | 1/ | 1/ | 112 | - | 390 | 324 |
| Other Countries | 61 | 43 | 6/ 78 | 102 | 169 | 185 | 129 |
| Total | 636 | 392 | 1,084 | 2,091 | 3,074 | 1,998 | 4,373 |

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1/ If any, included in other countries. 2/ Includes scrap.
3/ Includes Gambia, Sierra Leone, Gold Coast, and Nigeria.
4/ 201,000 pounds in 1943. 5/ Includes 236,436 for 1946 only.
6/ Includes 200,027 pounds for Sweden for 1946 only.

Source: Annual Statement of Trade and Shipments of Union of South Africa, and reports from U. S. Foreign Service Officers.

Use of tobacco by kind in products manufactured in the Union of South Africa

| Year | Flue-cured | Light Air-cured | Dark Air-cured Snuff | Dark Air-cured Other | Turkish | Total |
|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | |
| 1945 | 17,376 | 7,527 | 2,694 | 7,530 | 628 | 35,755 |
| 1946 | 17,476 | 8,939 | 2,198 | 7,509 | 599 | 36,721 |
| 1947 | 20,177 | 7,486 | 1,820 | 5,883 | 555 | 35,921 |
| 1948 | 20,077 | 7,349 | 1,721 | 7,310 | 690 | 37,147 |
| 1949 | 19,558 | 8,268 | 2,704 | 9,572 | 840 | 40,942 |
| 1950 | 20,536 | 9,182 | 2,591 | 9,942 | 920 | 43,171 |
| 1951 | 19,866 | 10,047 | 2,746 | 9,652 | 959 | 43,270 |
| 1952 | 19,067 | 9,461 | 2,970 | 12,206 | 911 | 44,615 |
| 1953 | 18,983 | 1/ 22,546 | 2/ | 2/ | 835 | 42,364 |

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1/ Includes light air-cured, snuff and other dark air-cured.
2/ Included in light air-cured.
Source: Reports from U. S. Foreign Service Officers, Reports of Tobacco Industry Control Board and Tobacco Intelligence.

Union of South Africa: Consumption of manufactured tobacco by kind of product

| Year | Cigarettes and Pipe | Snuff | Roll | Cigars | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1945 | 31,442 | 2,745 | 1,365 | 203 | 35,755 |
| 1946 | 32,932 | 2,257 | 1,423 | 109 | 36,721 |
| 1947 | 32,748 | 1,893 | 1,221 | 59 | 35,921 |
| 1948 | 34,032 | 1,785 | 1,250 | 81 | 37,148 |
| 1949 | 36,900 | 2,751 | 1,198 | 93 | 40,942 |
| 1950 | 39,222 | 2,656 | 1,167 | 126 | 43,171 |
| 1951 | 39,219 | 2,789 | 1,188 | 73 | 43,269 |
| 1952 | 40,366 | 3,041 | 1,129 | 79 | 44,615 |

Source: Report of the Tobacco Industry Control Board for year ended April 30, 1953.

Manufacturing and Consumption

Cigarettes account for about half of the tobacco used, but a much higher proportion than in most other countries is consumed as pipe tobacco. Also, the consumption of tobacco in the form of snuff (6.9 percent in 1953) and chewing tobacco, particularly by natives, is above averages of most countries. While straight flue-cured cigarettes are popular, the trend is toward the blended type. The quality of cigarettes is improving as Orinoco replaces Amarello.

Proportion of leaf tobacco used in various tobacco products

| Kind of Product | 1952 | 1943-52 |
|---|---|---|
| | Percent | Percent |
| Cigarettes | 49.6 | 89.9 |
| Pipe Tobacco | 40.8 | |
| Snuff | 6.9 | 6.5 |
| Roll (twist) | 2.5 | 3.3 |
| Cigars | 0.2 | 0.3 |
| Total | 100.0 | 100.0 |

Some difficulties are experienced by manufacturers in maintaining uniformity of product due to provisions of the Tobacco Industry Control Board that each manufacturer is required to fulfill his needs by purchases of the various grades in proportion to the production in each grade. This leads to the carrying of heavy stocks in order to avoid frequent and drastic shifts in the mixtures of grades used in the various products.

## Exports of Tobacco Products

Most of the exports of tobacco products go to the Protectorate of South West Africa, followed by Germany, United Kingdom, and British West Africa. Much of the exports are pipe and chewing tobacco with snuff taken by some African areas largely for consumption by natives.

Exports of manufactured tobacco products by the Union of South Africa in 1953

| Destination | Amount |
|---|---|
| | 1,000 pounds |
| South West Africa | 1/ 678.6 |
| Germany | 17.8 |
| British West Africa | 16.4 |
| United Kingdom | 15.1 |
| Southern Rhodesia | 2/ 13.0 |
| Australia | 9.1 |
| Northern Rhodesia | 7.6 |
| All others | 5.6 |
| Total | 763.2 |

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1/ Includes 73,190 pounds of roll, which is sometimes classed as unmanufactured tobacco.

2/ Includes 373 pounds of roll, which is sometimes classed as unmanufactured tobacco.

## Imports of Tobacco Products

Practically no cigarettes are now imported, although a few years ago, particularly in the 1946-48 period, imports were fairly large. Imports of other tobacco products are small (only 27,180 pounds in 1953) with nearly all of those taken, coming from Southern Rhodesia, United Kingdom, and Norway.

Imports of manufactured tobacco products into the Union of South Africa, 1945-53

| Year | Kind of Product | | | | |
|---|---|---|---|---|---|
| | Cigarettes | Cigars | Snuff | Other | Total |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1945 | 188.6 | 46.7 | 7.5 | 45.3 | 288.1 |
| 1946 | 725.5 | 170.5 | 12.2 | 73.2 | 981.4 |
| 1947 | 978.5 | 124.6 | 7.2 | 68.1 | 1,178.4 |
| 1948 | 866.2 | 81.1 | 13.3 | 69.5 | 1,030.1 |
| 1949 | 96.5 | 17.8 | 1.7 | 28.3 | 144.3 |
| 1950 | 82.5 | 30.8 | 1/ | 206.3 | 319.6 |
| 1951 | 112.2 | 132.2 | 1/ | 25.4 | 269.8 |
| 1952 | 1/ | 2/ | 2/ | 2/ | 24.7 |
| 1953 | 1.0 | 2/ | 2/ | 2/ | 28.1 |

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1/ Less than 500 pounds.

2/ Not available.

## Import Duties on Products

Import duties as indicated below are fairly high. In 1952, duties were reduced 28 U. S. cents per pound on cigarettes and raised 14 U. S. cents per pound on cigars with no change in duties on other products. Below are the import duties in effect in 1953:

Cigarettes - 8 shillings per pound plus 1/3 pence surtax per 50 cigarettes - equivalent to 5.6 U. S. cents per pack of 20, except on products from Southern Rhodesia, which bears a duty equivalent to 2.8 U. S. cents per pack of 20 cigarettes.

Cigarette tobacco (cut) - 7 shillings 6 pence per pound - equivalent to $1.05 per pound or 5.02 U. S. cents per pack of 20 cigarettes.

Pipe Tobacco - 7 shillings per pound - equivalent to $1.45 per pound except from Geneva Tariff Agreement Countries for which the rate is 8 shillings 6 pence - $1.19 per pound.

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## CONFERENCE REPORT ON AMENDMENTS TO
## REPUBLIC OF THE PHILIPPINES ACT NO. RA 698

Because of the interest in amendment of Philippines Republic Act No. 698, the following provisions which were agreed to in conference (for reconciling the differences between the bills S-152 and H-2165) are outlined herein for the Tobacco Industry.

This is an exact copy of the Bill which was sent to President Magsaysay for signature. As of August 16, when the most recent report available to this Office was sent from Manila, the President of the Philippines had not signed this Act.

THIRD CONGRESS
OF THE
REPUBLIC OF THE PHILIPPINES

SPECIAL SESSION

(REPUBLIC ACT NO. )

AN ACT TO AMEND REPUBLIC ACT NUMBERED SIX HUNDRED NINETY-EIGHT, ENTITLED "AN ACT TO LIMIT THE IMPORTATION OF FOREIGN LEAF TOBACCO"

Be it enacted by the Senate and House of Representatives of the Philippines in Congress assembled:

SECTION 1. Section one of Republic Act Numbered Six hundred ninety-eight is amended to read as follows:

"SECTION 1. The importation of foreign leaf tobacco shall be limited as follows:

"For 1954 -- Forty percent of the total importation in 1950.
"For 1955 -- Twenty-five percent of the total importation in 1950.
"For 1956 and succeeding years, importation shall be subject to the

following provisions:

"After the harvest of tobacco every year, and after the reports of every town recorded in the Bureau of Plant Industry as growing Virginia leaf tobacco, through their respective councils, have been received by the ACCFA, and after all Virginia leaf tobacco for sale in their respective areas shall have been bought by the ACCFA or any Government agency or any buyer not later than August one, the ACCFA shall report to the President whether or not the indigenous production of Virginia-type leaf tobacco in the Philippines is insufficient to maintain the manufacture in the country of tobacco products in any year at a level sufficient to produce not less than the quantity of tobacco products manufactured in the preceding fiscal year as certified by the Bureau of Internal Revenue. The President of the Philippines upon receipt of such report that the local production is insufficient may authorize the importation of Virginia-type leaf tobacco necessary to maintain such level of production: Provided, That the foregoing provision shall be applicable to the fiscal years of nineteen hundred fifty-four and nineteen hundred fifty-five to meet deficiencies of supply, if any: Provided, further, That nothing herein shall be construed to limit the importation of wrapper leaf tobacco for cigars or chewing tobacco, nor to permit the importation of processed tobacco as defined in section 1-b hereof except Turkish tobacco."

SEC. 2. There are hereby inserted between sections one and two of the same Republic Act Numbered Six hundred ninety-eight the following new sections:

"SEC. 1-a. Virginia-type leaf tobacco authorized to be imported under this Act shall be allocated and distributed by the Monetary Board of the Central Bank among legitimate manufacturers of Virginia-type cigarettes on the basis of the production of each factory as reflected in its payment of specific taxes for Virginia-leaf cigarettes for the twelve-month period immediately preceding the month for which allocation is to be granted, taking also into consideration the stock inventory of each factory at the close of the calendar month preceding the allocation: Provided, That no manufacturer of Virginia-type cigarettes shall be entitled to the allocation provided for herein unless he presents a certificate showing that he has purchased locally produced Virginia-type leaf tobacco as provided in section 1-c hereof.

"Licenses for such importation shall be issued within fifteen days after the allocation made by the Central Bank as above provided, and the corresponding foreign exchange authorized by the Monetary Board of the Central Bank to the extent of the foreign exchange disposable by the Central Bank.

"The Government entity authorized to allocate and distribute the import licenses for Virginia leaf tobacco shall not grant any such licenses to any factory or manufacturer using imported tobacco that has on the record any violation of the Import Control Laws and Republic Act Numbered Six hundred ninety-eight limiting the importation of said tobacco, or any case of tax evasion.

"SEC. 1-b. By processed tobacco is meant leaf tobacco which is either blended, cased, flavored, ready cut, or cut fillers ready for manufacturing purposes, and shall not include tobacco leaf only the stem of which is removed. By Virginia-type leaf tobacco, as used in section 1-a, is meant any kind of tobacco, leaf or scrap, for the manufacture of cigarettes.

"SEC. 1-c. All locally grown and produced Virginia-type leaf tobacco shall be purchased by the Government through the ACCFA, any provision of law to the contrary notwithstanding, for resale to the manufacturers of Virginia-type cigarettes at cost. The Central Bank, through the Rehabilitation Finance Corporation, shall grant the ACCFA the necessary loans with which to effect the purchase of said tobacco; and to cover the expenses in connection with the handling and warehousing thereof. Nothing in this provision shall be construed to prohibit manufacturers of Virginia-type cigarettes or other dealers to buy Virginia-type tobacco from the farmers, cooperatives or any private dealers.

"The prices at which said locally grown and produced Virginia-type leaf tobacco may be purchased shall not be less than those fixed in the following schedule:

"For flue-cured Virginia leaf tobacco:

| | Per Kilo | U.S. cents per pound 1/ |
|---|---|---|
| a. Bright yellow leaf | ₱3.60 | 81 |
| b. Dull yellow leaf | 3.00 | 68 |
| c. Spotted yellow leaf | 2.50 | 56 |
| d. Greenish and brownish leaf | 2.00 | 45 |
| e. Dark or other kinds | 1.50 | 34 |

"For sun-dried Virginia leaf tobacco:

| | | |
|---|---|---|
| a. Light brown leaf tobacco | ₱ 1.50 | 34 |
| b. Brown leaf tobacco. | 1.00 | 23 |
| c. Dark brown and other kinds | .80 | 18 |

"The shares of such manufacturers in such locally grown and produced tobacco to be resold to them shall be allocated in the same manner as the tobacco imported under this Act is distributed among them: Provided, That in computing the allocation of such locally grown Virginia leaf tobacco to such manufacturers the volume of their direct purchase from the farmers shall be taken into consideration.

"SEC. 1-d. The President of the Philippines may require the Philippine Tobacco Administration to assist the ACCFA in making purchase of Virginia-type leaf tobacco locally produced, assign to said Administration the function of making such purchase for and in behalf of the ACCFA, and to entrust to said Administration such other duties as may be necessary to carry out the provisions of the preceding section.

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1/ Converted to U.S. currency on the basis of 49.7 pesos per one U.S. dollar.

"SEC. 1-e. Any person, association or corporation which shall import Virginia-type leaf tobacco without the necessary licenses issued under this Act, and any officer or employee of the Central Bank who shall issue such license without the authorization of the President of the Philippines as provided in this Act or who shall obstruct the grant of loans needed by the ACCFA or any person, association, corporation, official or employee in the Government who violates any provision of this Act, shall be punished by a fine of not less than one thousand pesos nor more than ten thousand pesos, and by imprisonment for not less than one year nor more than five years, in the discretion of the Court: Provided, That if the offense is committed by an association or corporation, the president, manager or administrator and the director or directors committing the offense shall be responsible thereof; and should the offender be an alien, he shall, after final conviction, be deported without further deportation proceedings:

Provided, further, That the leaf tobacco involved in the offense shall be forfeited to the Government."

SEC. 3. This Act shall take effect upon its approval.

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# TOBACCO PRODUCTION AND TRADE OF MOZAMBIQUE (PORTUGUESE EAST AFRICA) [1]

By James W. Birkhead

## Summary

Production of tobacco is small, but is increasing and the expansion is likely to continue. The preference on light tobaccos imported into Portugal from Portuguese territories was increased from 10 to 15 percent in an effort to stimulate production in Portuguese territories, and this will be a factor in increasing production. There is considerable concentration on increasing the production of flue-cured in an effort to expand exports. Domestic flue-cured is neutral and rather similar to that grown in Southern Rhodesia. The leaf has not been redried in the past, but equipment for this purpose has recently been installed in two areas.

The blended cigarette is popular with persons of European descent, but dark tobaccos are used for most of the cigarettes as well as other tobacco products consumed by the natives. From 300,000 to 400,000 pounds of leaf have been imported annually in recent years. About 75 percent of the imported leaf is dark tobacco from Angola. Most of the remainder of the imports are flue-cured from the United States and Southern Rhodesia, but some Burley and Maryland are taken from the United States. In order to produce a high quality cigarette, U. S. tobacco of good flavor and aroma is needed to blend with domestic leaf, but as domestic production and quality increase, there will be pressure to decrease imports. From 250,000 to 300,000 pounds of flue-cured leaf are exported annually. Most of this is sent to Angola (Portuguese West Africa) and Portugal. Exports are likely to rise as production expands. Small amounts of manufactured products, mostly cigarettes, are sold to ships or exported to other Portuguese territories. Imports of manufactured tobacco are relatively unimportant.

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[1] The author has recently returned from a trip through Africa and Brazil, where he studied tobacco production and trade. This is one of a series of reports, which also includes Southern Rhodesia, Northern Rhodesia, Nyasaland, British East Africa, Madagascar, Union of South Africa, Belgian Congo, and Brazil.

## Introduction

Mozambique is a long, narrow strip of land extending along the south-eastern coast of Africa. It is bounded on the East by the Mozambique channel, on the West by the Union of South Africa, Southern Rhodesia, and Northern Rhodesia, and on the North by Tanganyika. Mozambique has an area of 297,650 square miles, almost six times the size of North Carolina. There is a total population of slightly less than six million of which only about 2 percent are non-natives. The non-native population is concentrated in cities, chiefly the ports of Beira and Lourenco Marques. Agriculture is the main industry and the country is relatively undeveloped.

## Production

Total production of leaf tobacco is small being estimated at only 2.22 million pounds in 1954. About 2.0 million pounds were flue-cured and 220,000 pounds were dark sun-cured. Although production is small, the output of flue-cured in 1954 was about 50 percent above the previous high and the rising trend is expected to continue.

Tobacco is produced in three areas. Some flue-cured is produced in the Vila Pery region, which is a new tobacco area located along the railroad line which connects Salisbury, Southern Rhodesia and Beira, Mozambique. There were about 30 producers in the Vila Pery area in 1954. The elevation in this area is about 2,500 feet above sea level and the soil may be a little heavy for producing high quality flue-cured tobacco, but otherwise conditions for successful production appear favorable. The Portuguese apparently accept cigarettes from the flue-cured leaf produced on heavy soils. The other flue-cured production region is further north near the southern-most flue-cured producing area of Nyasaland. This area centers around Malema and Entrerios. There are about 70 to 80 farmers producing flue-cured tobacco in the Malema area and the average yield is reported to be about 600 pounds per acre. The elevation is from 2,600 to 3,500 feet. The current increased emphasis on increasing production for export is confined largely to the Vila Pery area.

Flue-cured is transplanted in September and October and harvested in February, March, and April. Nematodes are prevalent and cause considerable damage. Curing barns are made of brick or cement as termites quickly destroy wooden structures. Presently, wood is used exclusively as fuel for flue-curing the leaf.

The grades of flue-cured are based primarily on size of leaf, number of spots and the degree of brokenness in the leaf. Some account is taken of the color, texture, flavor, and aroma, but these have not been given adequate consideration. There are plans for changing the system of grading so that classes will be determined chiefly by position of the leaf on the stalk, but also taking into account the other important characteristics. The aged flue-cured leaf is somewhat heavy and is fairly dark in color. However, the dark color may be due to the high degree of fermentation occurring because the leaf has not been redried.

Tobacco beetles, which are prevalent throughout Africa, cause quite a bit of damage to tobacco, although one of the companies in Lourenco Marques has a warehouse so constructed that fumigation has been very successful.

Dark sun-cured is produced in the southern part of the country in the Macia-Chimonzo area near Lourenco Marques. It is grown under irrigation and is very strong and mostly low quality with a relatively high proportion of fiber in the stem and laterals. The dark tobacco is used primarily for the production of cigarettes for the native trade. The yield of dark tobacco is about 1,000 to 1,100 pounds per acre. Officials in the Department of Agriculture think that Burley tobacco can also be produced in this area; however, soils of the region appear to be fairly heavy.

The dark sun-cured leaf has been classed into only two grades depending on length of leaf - - 18 inches or longer and less than 18 inches. Apparently not much attention has been paid to color or texture. Length actually is not in itself very important as most of the dark tobacco is used in cigarettes. A representative of the Government said that he hopes to get the grading system changed to include three grades based primarily on position of the leaf on the stalk. The highest quality grade would be from the middle of the stalk, the second grade from the top of the stalk with the lowest grade being taken from the lower part of the stalk. Adequate consideration is not given to color and texture as factors affecting the quality of leaf.

Mozambique: Acreage and production of tobacco, 1935-54

| Year | Acreage | Production |
|---|---|---|
| | Acres | 1,000 pounds |
| 1935-39 1/ | 1,000 | 467 |
| 1940-44 | 1,965 | 849 |
| 1945 | 2,639 | 1,175 |
| 1946 | 2,856 | 1,343 |
| 1947 | 3,291 | 1,489 |
| 1948 | 3,395 | 1,300 |
| 1949 | 3,291 | 1,489 |
| 1950 | 3,661 | 1,472 |
| 1951 | 2/ | 1,519 |
| 1952 | 2/ | 1,478 |
| 1953 | 2/ | 1,500 |
| 1954 | 2/ | 3/ 2,220 |

1/ Less than a 5-year average.

2/ Not readily available.

3/ Estimated by specialists in Mozambique at 2,200,000 pounds of flue-cured and 220,000 pounds of dark sun-cured.

Source: Estatistica Agricola, Anuario Estatistico, Mozambique, and official estimates of foreign countries, reports from U. S. Foreign Service Officers.

## Marketing

Presently, the tobacco produced in Mozambique is not redried. Redrying equipment has been installed at Malema, but was not operating during the marketing season of 1954. Producers are to be charged 2.5 escudos per kilo (about 4 cents per pound) for redrying and packing their tobacco there. The Government now operates the plant, but they plan to transfer the operation of these facilities to the Tobacco Producers Association as soon as the plant and equipment are paid for. Plans have been made and equipment ordered early in 1954 for redrying facilities in Chiomo in the Vila Pery area. This plant also will be owned by the Government until the initial investment is recovered, at which time it will be turned over for operation by the Tobacco Producers Association.

There is no auction system. Growers are paid on the basis of minimum prices established in accordance with provisions of legislation enacted in 1947-48.

Manufacturers submit estimates of their requirements prior to the harvest, as they may purchase this portion of the crop at the established minimum prices. If a manufacturer later wishes to purchase more than the requirements estimated earlier, it may be necessary for him to pay more than the minimum prices established.

## Exports of Unmanufactured Tobacco

Exports of unmanufactured tobacco are relatively small, ranging from 133,000 to 472,000 pounds per year during the 1948-52 period. These exports are mostly flue-cured leaf shipped to Angola and Portugal. Although exports are now small, it appears likely that they will rise significantly in the next few years as production expands. Surplus output will likely first be sold in Portugal and Portuguese territories because establishing export outlets in other countries now securing leaf elsewhere will be more difficult.

Mozambique: Exports of unmanufactured tobacco by country of destination, 1946-52

| Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 |
|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Portugal | - | 110 | 253 | - | 132 | - | 122 |
| Angola | 151 | 32 | 219 | 270 | 115 | 133 | 202 |
| Germany (West) | - | - | - | - | - | - | 11 |
| Total | 151 | 142 | 472 | 270 | 247 | 133 | 335 |

Source: Estatistica de Comercio e da Navegacion

## Imports of Unmanufactured Tobacco

In recent years, 350,000 to 400,000 pounds of unmanufactured tobacco have been imported. The bulk of these imports have been low-grade, dark air-cured leaf from Angola (Portuguese West Africa). The United States and Southern Rhodesia supply practically all of the remainder of the leaf imports. Most of that from the United States is flue-cured, but we also supply small quantities of Burley and Maryland. Imports from the United States have been increasing, but the highest level attained was only 76,000 pounds which was taken in 1953.

Imports are likely to decline as domestic production of leaf tobacco expands, but high quality leaf of good aroma and flavor are needed for blending with domestic leaf in order to produce the better brands of cigarettes.

Mozambique: Imports of unmanufactured tobacco by country of origin, 1935-53

| Year | Angola | United States | Southern Rhodesia | Other | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1935-39 | 86 | 21 | 102 | 2/ | 209 |
| 1940-44 | 52 | 40 | 67 | 4 | 164 |
| 1945 | 71 | 42 | 21 | 2/ | 134 |
| 1946 | 176 | 40 | 47 | 2 | 265 |
| 1947 | 342 | 64 | 37 | 1/ | 443 |
| 1948 | 208 | 60 | 28 | - | 296 |
| 1949 | 283 | 44 | 51 | 2/ | 378 |
| 1950 | 298 | 80 | 27 | 4 | 409 |
| 1951 | 254 | 74 | 22 | 1 | 350 |
| 1952 | 218 | 57 | 13 | 4 | 292 |
| 1953 | 1/ | 76 | 15 | 1/ | 1/ |

1/ Not available.
2/ Less than 500 pounds.
Source: Estatistica do Comercio Externo e da Navegacao Mozambique.

## Manufacture of Tobacco Products

The total output of tobacco products in 1953 is estimated at about 1.8 to 2.0 million pounds, most of which was cigarettes. Although straight flue-cured cigarettes are in demand, the American-blended type is most popular with the population of European descent. Most of the blends are made largely from mixtures of flue-cured and dark air-cured. Most of the cigarettes consumed by the native population are made of dark tobacco, but the lighter types are gaining in favor with this segment of the population.

Mozambique: Production of manufactured tobacco by kind of product, 1941-51

| Year | Cigarettes | Other | Total |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1941-44 1/ | 672 | 12 | 684 |
| 1945 | 962 | 32 | 994 |
| 1946 | 1,010 | 19 | 1,029 |
| 1947 | 1,252 | 7 | 1,259 |
| 1948 | 1,289 | 1 | 1,290 |
| 1949 | 1,388 | 6 | 1,394 |
| 1950 | 1,559 | 2 | 1,561 |
| 1951 | 1,519 | 9 | 1,528 |

1/ Four-year average. Breakdowns not given prior to 1941.
Source: Estatistica Agricola and Anuario Estatistico, Mozambique.

There is considerable "home production" of a few plants in native gardens, but the amount of this is not known. This is dark air-cured tobacco, which is processed and used at home or sold through native markets.

Imports of Tobacco Products

The relatively small imports of manufactured products are composed largely of cigarettes and cigars. Most of the imported cigarettes are from the United Kingdom and Southern Rhodesia, but those from the United States and Union of South Africa are also popular. Imports of cigarettes reached a peak in 1949 having declined since that time as domestic output has expanded. The bulk of imported cigars come from the Netherlands.

Mozambique: Imports of manufactured tobacco by kind, 1946-52

| Year | Cigars and Cheroots | Cigarettes | Cut Tobacco | Total Imports |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1946 | 2.1 | 2.7 | 0.1 | 4.9 |
| 1947 | 1.0 | 3.4 | 0.2 | 4.6 |
| 1948 | 0.7 | 3.8 | 0.1 | 4.7 |
| 1949 | 1.0 | 4.5 | 1/ | 5.5 |
| 1950 | 1.6 | 2.7 | 0.1 | 4.4 |
| 1951 | 2.7 | 1.4 | 1/ | 4.1 |
| 1952 | 2.6 | 1.1 | 1/ | 3.7 |

1/ Less than 100 pounds.
Source: Estatistica do Comercio e da Navigacion

Exports of Products

Exports of manufactured tobacco products are not large, but are relatively important to the tobacco industry. Most of the foreign sales are cigarettes supplied to ships with the bulk of the remainder sent to Portuguese Guinea and other Portuguese territories.

Mozambique: Exports of manufactured tobacco by product and country of destination, 1946-52

| Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 |
|---|---|---|---|---|---|---|---|
| | | | | 1,000 pounds | | | |
| Cigarettes | | | | | | | |
| Portuguese Guinea | 1.8 | 0.8 | 0.1 | 0.1 | 2.3 | 4.2 | 2.3 |
| San Tome and Principe | 0.8 | 0.6 | 0.4 | 1/ | - | 1.1 | - |
| Timor | - | 12.2 | 0.4 | - | - | 0.4 | - |
| Other Countries | 8.5 | 0.2 | 0.6 | 0.6 | 0.1 | 1/ | 2.9 2/ |
| Ships' Supplies | 10.8 | 3.5 | 3.8 | 5.8 | 5.6 | 5.8 | 7.2 |
| Other Manufactured Tobacco | | | | | | | |
| Cape Verde | 0.5 | - | 0.6 | 2.2 | - | - | 3/ |
| Portuguese Guinea | 0.3 | 0.2 | 0.1 | - | - | - | 3/ |
| San Tome and Principe | 0.9 | 0.2 | 0.4 | 0.4 | 1/ | - | 3/ |
| Other Countries | - | 1.0 | - | 1/ | 1/ | - | 3/ |
| Ships' Supplies | 1.4 | 0.4 | 0.6 | 0.5 | 0.6 | 1.1 | 3/ |
| Total Exports | 25.0 | 19.1 | 7.0 | 9.6 | 8.6 | 12.7 | 3/ |

1/ Less than 100. 2/ Principally to Portugal. 3/ Not readily available.
Source: Estatistica do Comercio Externo.

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# TOBACCO PRODUCTION AND TRADE OF BRITISH EAST AFRICA (KENYA, TANGANYIKA, UGANDA), AND ZANZIBAR

By James W. Birkhead [1]

British East Africa is composed of Kenya, Uganda, and Tanganyika. Also, the adjacent island of Zanzibar, which is a British Protectorate, is included in this study. This is a large land area of 647,500 square miles, over 12 times the size of North Carolina, but the population is small. In 1951, there was a total population of about 19 million of which only 2 percent were non-natives. Most of the non-native population is of European and Indian descent.

Kenya, Uganda, and Tanganyika are treated as a unit, and unmanufactured tobacco and tobacco products moving within this area are considered as domestic trade; for example, unmanufactured leaf moving from Tanganyika to Uganda or manufactured products shipped from Uganda to Tanganyika and Kenya are classed as domestic trade and not exports and imports of the respective areas.

The policies applied to Zanzibar are closely correlated with those of Kenya, Uganda, and Tanganyika, but Zanzibar is considered separately as import duties and certain other important aspects differ from those in effect in the three areas of the African mainland, which are administered under a joint high commission.

## Summary of the Overall Tobacco Situation in British East Africa

Consumption of tobacco products in British East Africa is fairly small, but is likely to increase rapidly with a shift to lighter type of cigarettes as the incomes rise and the tastes of the natives change. Presently, the non-native population is small and the incomes of natives very low.

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[1] The author has recently returned from a trip through Africa and Brazil, where he studied tobacco production and trade. This is one of the series of reports, which also includes the Union of South Africa, Federation of Rhodesia and Nyasaland, Madagascar, Mozambique (Portuguese East Africa), Belgian Congo, and Brazil. The author wishes to acknowledge the valuable assistance of Mr. S. F. Phillips of the East Africa Tobacco Company, Nairobi, Kenya.

Production, excluding "high nicotine" leaf, is estimated at 9.1 million pounds in 1953-54, a substantial increase over the previous two years. About 4.3 million pounds of fire-cured, 4 million pounds of flue-cured, and 837,000 pounds of air-cured were produced in 1953-54. Production, particularly of flue-cured, is likely to continue to expand in Uganda and Tanganyika with prospects for little change in output in the next few years in Kenya. The future level of production for export from this area depends on the policies adopted by the United Kingdom Government as well as those followed by certain tobacco manufacturing companies.

About one-half million pounds of tobacco products, mostly cigarettes, were exported in 1952. (Later data are not readily available.) Most of these were shipped to the Belgian Congo and Zanzibar. Data for the Belgian Congo indicate that takings from British East Africa fell sharply in 1953, as production expanded in the Belgian Congo.

Substantial quantities of cigarettes have been imported from the United Kingdom, but shipments continue to decline as domestic production expands. Import duties are very high, being about $1.89 per pound on unmanufactured leaf and $4.62 per pound of cigarettes (equivalent to 23 U. S. cents per pack of 20 cigarettes).

An average of about 3.1 million pounds of unmanufactured leaf, practically all of which is flue-cured, has been imported annually in the last five years. About one-third of this has come from the United States with most of the remainder from India, Southern Rhodesia, and Nyasaland.

As production and quality of domestic flue-cured improve, imports of U. S. leaf are likely to decline further, even though imported leaf with good aroma and flavor are needed to produce high quality cigarettes.

## Exports of Unmanufactured Tobacco

In most years, more than half of the exports of unmanufactured tobacco are sent to the United Kingdom. Netherlands and Egypt have taken significant quantities in recent years with smaller amounts sent to Somaliland, Zanzibar, and Aden. In 1950 and 1952, West Germany purchased small quantities. Total exports in recent years reached a peak level of 2.7 million pounds in 1949 and 1950, but have since declined. There has been an increasing demand for leaf for manufacture of products in British East Africa, and a weakening of demand for leaf from this area in some importing countries as output expands in Southern Rhodesia.

British East Africa: Production of tobacco by kind, 1935-54 (farm sales weight)

| Area and Kind | Average 1935-39 | Average 1940-44 | Average 1945-49 | 1949-50 | 1950-51 | 1951-52 | 1952-53 | 1953-54 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Kenya | | | | | | | | |
| Flue-cured | - | 1/ 139 | 221 | 250 | 220 | 182 | 220 | 220 |
| Total | - | 1/ 139 | 221 | 250 | 220 | 182 | 220 | 220 |
| Tanganyika | | | | | | | | |
| Flue-cured | 2/ 6 | 691 | 1,326 | 3,087 | 2,804 | 2,289 | 1,994 | 2,901 |
| Dark fire-cured | 367 | 843 | 1,165 | 3,261 | 2,361 | 1,317 | 851 | 1,781 |
| Dark air-cured | 501 | 613 | 638 | 536 | 506 | 372 | 254 | 437 |
| Total | 874 | 2,147 | 3,129 | 6,884 | 5,671 | 3,978 | 3,099 | 5,119 |
| Uganda | | | | | | | | |
| Flue-cured | - | 3/ 21 | 59 | 300 | 608 | 605 | 945 | 880 |
| Dark fire-cured | 1,294 | 2,276 | 2,086 | 2,325 | 1,644 | 1,944 | 2,386 | 2,500 |
| Dark air-cured | 206 | 67 | 125 | 380 | 535 | 473 | 401 | 400 |
| High Nicotine | 4/ | 4/ | 1,029 | 1,200 | 896 | 479 | 4/ | 4/ |
| Total | 5/1,500 | 5/2,364 | 3,299 | 4,205 | 3,683 | 3,501 | 5/3732 | 5/3780 |
| British East Africa | | | | | | | | |
| Flue-cured | 6 | 851 | 1,606 | 3,637 | 3,632 | 3,076 | 3,159 | 4,001 |
| Drk.fire-cured | 1,661 | 3,119 | 3,251 | 5,586 | 4,005 | 3,261 | 3,237 | 4,281 |
| Dark air-cured | 707 | 680 | 362 | 916 | 1,041 | 845 | 655 | 837 |
| High nicotine | 4/ | 4/ | 1,029 | 1,200 | 896 | 479 | 4/ | 4/ |
| Total | 5/2,374 | 5/4,650 | 6,248 | 11,339 | 9,574 | 7,661 | 7,051 | 9,119 5/ |

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1/ Includes 1942-43 and 1943-44 only.
2/ 34,200 pounds in Tanganyika 1938-39 only with none reported previously.
3/ Average for last 3 years only.
4/ Not available.
5/ Does not include high nicotine tobacco.

British East Africa (Kenya, Uganda, and Tanganyika): Exports of unmanufactured tobacco by country of destination, 1945-52

| Country of Destination | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United Kingdom | 205 | 830 | 745 | 1,142 | 1,535 | 834 | 780 | 1,001 |
| Netherlands | - | - | 11 | 227 | 756 | 973 | 778 | 248 |
| Egypt | - | - | 31 | 92 | 182 | 199 | 172 | 41 |
| Germany (West) | - | - | - | - | - | 165 | - | 133 |
| Aden | - | 378 | - | 71 | - | 29 | 26 | 34 |
| Somalia (Italian) | 1/ | 1/ | 1/ | 53 | 47 | 6 | 110 | 85 |
| Zanzibar | 18 | 37 | 63 | 36 | 14 | 77 | 21 | 11 |
| Other Countries | 137 | 951 | 119 | 6 | 186 | 2/391 | 58 | 100 |
| Total | 360 | 2,196 | 978 | 1,627 | 2,720 | 2,674 | 1,945 | 1,653 |

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1/ If any, is included in other countries.
2/ Includes 355,000 pounds exported to Mozambique.
Source: Annual Trade Report of Kenya, Uganda, and Tanganyika.

British East Africa (Kenya, Uganda, and Tanganyika): Exports of manufactured tobacco by country of destination, 1945-52

| Commodity and Country | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Cigarettes | | | | | | | | |
| Belgian Congo | 1,105 | 1,010 | 724 | 730 | 433 | 501 | 426 | 444 |
| Ruanda Urundi 1/ | - | - | - | - | 5 | 25 | 21 | - |
| Zanzibar | 130 | 136 | 131 | 60 | 68 | 40 | 45 | 46 |
| Other Countries | 210 | 247 | 215 | 146 | 118 | 23 | 2/ | 1 |
| Total | 1,445 | 1,393 | 1,070 | 936 | 624 | 589 | 492 | 491 |
| Other Manufactured Tobacco | | | | | | | | |
| Zanzibar | 19 | 35 | 11 | - | - | - | 9 | - |
| Other Countries | 6 | 3/ | 15 | 1 | - | 1 | - | 3 |
| Total | 25 | 35 | 26 | 1 | - | 1 | 9 | 3 |
| Grand Total | 1,470 | 1,428 | 1,096 | 937 | 624 | 590 | 501 | 494 |

1/ Ruanda Urundi is a Protectorate of the Belgian Congo.
2/ Not available.
3/ Less than 500.
Source: Annual Trade Report of Kenya, Uganda, and Tanganyika.

## Imports of Unmanufactured Tobacco

Imports of leaf tobacco have increased substantially in recent years, but declined in 1953. Most of the imports are flue-cured and the U. S., India, Southern Rhodesia, and Nyasaland supply practically all of the leaf imported.

In the last 10 years, imports from the United States have ranged from about 700,000 pounds to 2.5 million pounds with an average of 1.3 million annuall Imports from the U. S. declined to 1.05 million pounds in 1953. The importing companies hope to continue to take about this much in the next few years, but lack of dollars and increasing domestic production are important obstacles. The U. S. leaf with superior flavor and aroma is needed to blend with the lower grade neutral flue-cured produced locally, but as output and quality of domestic leaf improve, there will be increasing pressure to decrease the proportion and probably amount of leaf taken from the United States.

British East Africa (Kenya, Uganda, and Tanganyika): Imports of unmanufactured tobacco by country of origin, 1946-53

| Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United States | 1,761 | 1,219 | 797 | 2,485 | 1,234 | 676 | 1,787 | 1,054 4/ |
| India | 321 | 330 | 267 | 1,391 | 902 | 1,263 | 690 | 630 4/ |
| Southern Rhodesia | 169 | 3 | - | 197 | 249 | 1,268 | 819 | 376 4/ |
| Nyasaland | 168 | 339 | 337 | 352 | 50 | 179 | 50 | 5/ |
| Other Countries | 55 | 22 | 2/423 | 2 | - | 99 | 3/ 32 | 5/ |
| Total | 2,474 | 1,913 | 1,824 | 4,427 | 2,435 | 3,485 | 3,378 | 5/ |

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1/ Less than 500.
2/ Includes 419,000 imports from "Other British Possessions".
3/ All from Northern Rhodesia.
4/ Exports of respective countries. Exports for India are for the first nine months.
5/ Not available.

British East Africa (Kenya, Uganda, and Tanganyika): Imports of manufactured tobacco products by country of origin, 1945-52

| Commodity and Country | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Cigarettes | | | | | | | | |
| United Kingdom | 170 | 316 | 353 | 90 | 289 | 116 | 159 | 84 |
| U. of South Africa | - | 2 | - | - | - | - | 1/ | 1 |
| Other Countries | 3 | 3 | - | - | 1 | 1/ | 1/ | 1 |
| Total | 173 | 321 | 353 | 90 | 290 | 116 | 159 | 86 |
| Cigars and Cheroots | | | | | | | | |
| Total | 5 | 5 | 15 | 2 | 1 | 1 | 3 | 4 |
| Other Manufactured Tobacco | | | | | | | | |
| United Kingdom | 6 | 13 | 20 | 13 | 22 | 14 | 13 | 14 |
| U.of South Africa | 1 | 4 | 2 | 1 | 1 | 2 | 1 | 1 |
| Other Countries | 3 | 3 | 22 | 17 | 7 | 6 | 4 | 2 |
| Total | 10 | 20 | 44 | 31 | 30 | 22 | 17 | 17 |
| Grand Total | 188 | 346 | 412 | 123 | 321 | 139 | 179 | 107 |

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1/ Less than 500

Source: Annual Trade Report of Kenya, Uganda, and Tanganyika

## Imports of Tobacco Products

The imports of manufactured tobacco products into British East Africa are now fairly small. The bulk of the imports are cigarettes with some smoking tobacco and small quantities of cigars, chewing tobacco, and snuff. More than 90 percent of the total imports originate in the United Kingdom with small amounts from the Union of South Africa and other countries. Large quantities of cigarettes were formerly imported from the United Kingdom, but as the output of domestic factories steadily increase, shipments from the United Kingdom continue to decline.

Import duties on tobacco and tobacco products are high as indicated below.

Duties on tobacco and tobacco products imported into Kenya, Uganda, and Tanganyika

| Item | Local Currency per Pound | U. S. Currency per pound 1/ |
|---|---|---|
| | shillings | dollars |
| Unmanufactured tobacco | 13.5 | 1.89 |
| Cigarettes | 33.0 | 4.62 |
| Cigars, Cheroots and Cigarillos | 44.0 | 6.16 |
| Snuff | 9.0 | 1.26 |
| Other | 33.0 | 4.62 |

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1/ Converted from British East African pounds to U. S. currency on the basis of one BEA pound equivalent to $2.80 U. S.

## Exports of Tobacco Products

Relatively large quantities of cigarettes have been exported to the Belgian Congo and Zanzibar. The level of exports are likely to continue to decline as production facilities expand further in the Belgian Congo.

## Consumption

The latest estimate by type of product sold through regular stores was in 1951. In Kenya, the purchase of tobacco products sold through regular stores (exclusive of that produced and consumed at home or purchased through native markets - mostly, coil, chewing, and snuff and smoking tobacco) are estimated roughly at 80 percent flue-cured cigarettes, 11 percent Kali (fire-cured cigarettes), 6 percent shag tobacco, and 3 percent all other products.

The purchases of tobacco products through regular stores in Tanganyika is believed to be composed of about 65 percent flue-cured cigarettes, 30 percent Kali cigarettes, 4 to 5 percent shag with less than one percent for all other products.

Sales of tobacco products through regular stores in Uganda are composed roughly of 31 percent flue-cured cigarettes, 31 percent Kali cigarettes, 37 percent shag, and about 1 percent all other products.

Since 1951, there have been increases in population and purchasing power and sales of total tobacco products through regular stores have increased. The demand continues to increase for flue-cured cigarettes. A large proportion of total consumption by natives is grown and consumed at home or purchased from native markets. The latter is largely coils, smoking tobacco, and powder for chewing or snuff.

## Tobacco Products and Prices

There are several tobacco factories in British East Africa, but one company accounts for the bulk of output. Presently, this company has factories in Kampala and Jinga, Uganda and another factory is reported to be under construction in Nairobi, Kenya. There is only one small tobacco manufacturing company in Tanganyika. Zanzibar is included in the distribution system of the leading manufacturers in British East Africa.

The population of European descent consumes tobacco primarily in the form of straight flue-cured cigarettes. The natives consume some flue-cured cigarettes, but the bulk of tobacco used by natives is in the form of fire-cured cigarettes, snuff and shag smoking tobacco. The snuff is a fine powder and has an extremely strong odor. Snuff produced by the natives has ashes from a certain type of tree added, which, when moistened, apparently reacts in such a way as to release a higher percentage of the nicotine. Also, sometimes Indian Hemp may be added. Indian Hemp may also be added to cigarettes or smoking tobacco (known as "bang"), even though such is illegal. Many of the natives produce a few plants of tobacco (garden production), which are used at home or processed and sold in native markets. There is no tax on these "home processed" products sold in native markets.

The four most popular brands of flue-cured cigarettes, manufactured locally, retail for the equivalent of 18, 21, 14, and 17 U. S. cents per 20 cigarettes. One of the higher quality flue-cured brands made locally retails for the equivalent of 40.5 U. S. cents; while two other high quality brands retail for about 36.5 U. S. cents per 20 cigarettes.

In April 1954, the retail prices of other tobacco products consumed primarily by natives were as follows:

Shag - (mostly for roll-your-own cigarettes) 5.1 U. S. cents per pack of 3/8 ounces.

Snuff - 5.1 U. S. cents per pack of 3/8 ounces.

Fire-cured cigarettes - two popular brands 5.6 U. S. cents and another popular brand 7.0 U. S. cents, equivalent per 20 cigarettes.

## KENYA

### Production of Unmanufactured Leaf

Kenya has a land area of 223,500 square miles about four and one-half times the size of North Carolina. In 1951, there was a total population of 5.7 million of which only 200,000 were non-natives, mostly of British and Indian descent.

Production of flue-cured leaf is small with only about 220,000 pounds reported annually in recent years. Coarse low-grade dark air-cured and a little high nicotine leaf are produced, but no accurate data as to amounts are available.

The Orinoco flue-cured produced in this area is reported to be neutral, lacking in aroma, flavor, and of fairly course texture, but it is said to blend well with high quality imported leaf.

Flue-cured production is located in two areas in Kenya - Kitui and Sangana (Fort Hall). Soils are fairly well adapted, but most are somewhat heavy. Climate of the Eastern Highlands causes numerous problems as the elevation is pretty high for production of high quality flue-cured. Elevation of most of the Highlands area is between 4 and 5 thousand feet above sea level and the disease known as the white mold is common above 4,100 feet in the long rainy season and above 4,300 feet in the short rainy season. Seeds must be renewed frequently from other areas, otherwise, the quality of the tobacco produced deteriorates rather rapidly. Most of the output is white-stem Orinoco and Bonanza, but Harrison Special has been tried.

Two crops per year are grown with transplanting in March-April and September-October. The long-rains' crop planted in the March-April period is usually White Stem Orinoco with the short-rains' crop transplanted in September-October usually Bonanza, which matures early. Frequently, delay in start of the rains causes difficulties in transplanting, and because of dry weather the crop may often be replanted several times.

Most of the survey and developmental work on production of flue-cured leaf in Kenya and Uganda as well as in the Tundura area of Tanganyika has been done by private tobacco interests rather than by government authorities.

In Kenya, flue-cured is produced entirely by natives, but the seedbeds are under the supervision of a tobacco manufacturing company. Seedlings are issued to the natives and the leaf is purchased on a green leaf basis from the natives. The company then cures the leaf in its own curing barns as poor quality tobacco has resulted from leaf cured by the natives.

## KENYA

Kenya: Production of unmanufactured flue-cured tobacco, 1943-53 (farm sales weight)

| Period | 1,000 pounds |
|---|---|
| 1942-43 | 123 |
| 1943-44 | 156 |
| 1944-45 | 189 |
| 1945-46 | 164 |
| 1946-47 | 180 |
| 1947-48 | 200 |
| 1948-49 | 177 |
| 1949-50 | 250 |
| 1950-51 | 220 |
| 1951-52 | 182 |
| 1952-53 | 1/ 220 |
| 1953-54 | 1/ 220 |

1/ Estimates.

### Outlook

Tobacco production in Kenya may expand as relations between the whites and natives improve, native incomes increase, and purchasing power expands, but the level of output is not expected to change greatly in the next few years. As indicated above, most of the farmers of European descent live in the Eastern Highlands area, which may be too high for production of high quality flue-cured. In the low elevation areas inhabited by natives, there may be some adapted soils on which high quality flue-cured could be grown. However, representatives of the trade indicated that preliminary surveys have not revealed any large areas of adapted soils in these regions. The agricultural practices and methods now followed by many natives would not result in the production of high quality tobacco. Close supervision by personnel experienced in tobacco production is necessary in order to secure satisfactory quality leaf.

A recent report by the United Kingdom Government includes a 5-year program for the development of Kenya and plans are included for the expansion of tobacco production. Certain serious production problems must be overcome if any significant expansion in output of quality leaf is to be achieved in the next few years.

### Tobacco Manufacture and Trade

Most of the tobacco consumed in Kenya is manufactured in Uganda, although some is produced in a factory in Kenya and limited quantities are imported from outside British East Africa. Imports from outside the British East African area are largely cigarettes manufactured in the United Kingdom. Completion of a new cigarette factory, which was reportedly underway in mid-1954 in Nairobi, will reduce imports of tobacco products. Also, the location of a factory in Nairobi will reduce the transportation cost of tobacco imported through the seaports as such imported leaf is now shipped by rail from Mombasa to factories on Lake Victoria, which is much farther than from the seaport of Mombasa to Nairobi.

## TANGANYIKA

### Production

Tanganyika has an area of 342,700 square miles, almost six times as large as North Carolina, but the population in 1951 was only 7.8 million of which more than 98 percent were natives.

Only one crop of tobacco per-year is grown in Tanganyika, as it is out of the Equatorial rainbelt. The rainy season usually begins in October and tobacco is transplanted in October-December and harvested February-April.

Flue-cured production was started commercially in 1939, partly in an effort to meet local demand when imports could not be obtained because of war conditions. Production was stimulated by rising tobacco prices during the war period when imports were difficult or impossible to obtain. Most of the flue-cured production is in the Iringa area of the Southern Highlands, but there is also limited output around Tundura in the southeast and in the vicinity of Urambo near Tabora in the northwest.

Most of the flue-cured output is Amarello produced in the Iringa area, but flue-cured is also grown in the Songea area and small amounts are produced in the Urambo and Tundura areas. Flue-cured at Iringa is produced on farms owned by persons of Greek and Indian descent. Frequently, these are absentee landlords leaving the operations to natives, often from Nyasaland, who are supervised by managers. In the Tundura area, small plots are grown by natives under the supervision of a tobacco company, which handles the seedbeds, issues the seedlings and buys the green leaf, which is cured in barns owned by the company. In the Urambo area, flue-cured production is under the supervision of the British Overseas Food Corporation.

Most of the flue-cured is Amarello or Ehlers varieties. The Amarello leaf produced in the Iringa area is thin and it is said to shatter badly in processing; thus, making it difficult to get a fine string-type cut. Cigarettes produced from it are rather harsh in flavor and aroma, and are not popular with persons of European descent. Amarello is easier than Orinoco to produce because it is less subject to disease. Also, yields of Amarello are higher than Orinoco; therefore, it is difficult to get farmers to shift to Orinoco. The Ehlers variety, developed for high elevation areas of the Union of South Africa, is a cross between Amarello and an air-cured type, and was introduced about 1948. This variety has a broader leaf and produces heavier yields than the usual flue-cured varieties. It, like Amarello, is likely to be replaced by other varieties, as those consuming the flue-cured type of cigarette desire a product that is lighter and milder than those produced from the flue-cured types presently grown.

Flue-cured in the Iringa area is marketed, processed, and sold for export through the Southern Highlands Non-Native Tobacco Growers Union. The usual production problems that occur at high elevations are present with White Mold usually causing considerable damage.

Only a small amount of flue-cured is not grown around Tundura, but the soil and climate are favorable for quality production. The soil is well adapted and the elevation is about 1500 feet, except along the streams. Although soil and climate seem favorable for expansion, the area is presently remote insofar as access to centers of transport and communications are concerned. There are very few persons of European descent in the area, thus expanding output would depend on production by the natives or future immigrants, who are willing to live in such low elevation areas.

## TANGANYIKA

Tanganyika: Production of tobacco by kind, 1935-54
(farm sales weight)

| Year | Flue-Cured | Fire-Cured | Air-Cured | Total |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1935-39 | 1/ 6 | 367 | 501 | 874 |
| 1939-40 | 66 | 963 | 705 | 1,734 |
| 1940-41 | 323 | 791 | 883 | 1,997 |
| 1941-42 | 814 | 694 | 560 | 2,068 |
| 1942-43 | 1,133 | 1,046 | 489 | 2,668 |
| 1943-44 | 1,120 | 721 | 430 | 2,271 |
| 1944-45 | 2/ 1,000 | 2/ 600 | 2/ 461 | 2,061 |
| 1945-46 | 1,027 | 586 | 1,000 | 2,613 |
| 1946-47 | 1,005 | 737 | 585 | 2,327 |
| 1947-48 | 1,900 | 1,590 | 703 | 4,193 |
| 1948-49 | 1,701 | 2,311 | 450 | 4,462 |
| 1949-50 | 3,087 | 3,261 | 536 | 6,884 |
| 1950-51 | 2,804 | 2,361 | 506 | 5,671 |
| 1951-52 | 2,289 | 1,317 | 372 | 3,978 |
| 1952-53 | 851 | 1,994 | 254 | 3,099 |
| 1953-54 3/ | 1,781 | 2,900 | 437 | 5,118 |

1/ 34,200 pounds reported in 1938-39 only with none reported previously.
2/ Estimated.
3/ Preliminary

Recently, a tobacco company operating in British East Africa made an agreement with the Southern Highlands Non-Native Tobacco Growers to purchase at fixed prices substantial quantities of the tobacco produced throughout the 1954-57 period. The fixed pricing arrangement is designed to assure producers an income level that would encourage expansion.

Intensive efforts will continue in regard to improving quality as well as handling and grading of the crop. A large experimental farm has been established at Iringa and a scientist, formerly with the Southern Rhodesian Tobacco Experimental Farm at Trelawney, has been employed. Emphasis will be given to developing varieties of flue-cured adapted to the soil and climatic conditions of British East Africa. It is hoped by representatives of the local tobacco trade that an improved variety can be developed to replace Amarello.

Fire-cured of the Western variety is grown in the Songea and Nyamirembe areas of the Southern Province, and the Biharamulo and Kibondo districts in the Lake Province. Seeds are distributed free through the Cooperative Marketing Union. There is a Nyamirembe Native Tobacco Board and a Songea Native Tobacco Board created to promote efficient and orderly marketing. The Songea Board since 1946 has acted as agents for the Ngoni-Matengo Cooperative Marketing Union, Ltd. Cured leaf is purchased by the Cooperative Marketing Union and transported to the plant in Songea, where it is regraded and packed.

In the Songea area in the southwestern part of Tanganyika (near Lake Nyasa), dark fire-cured leaf is grown by natives under the supervision of the African Cooperative.

## TANGANYIKA

Coil tobacco (dark air-cured) is widely grown by natives, but production of this type is centered largely in the Southern, Tanga, and Eastern Provinces. There are no accurate data on production of this kind of leaf, but in recent years it is estimated at between 600,000 and 800,000 pounds annually. Natives in the Western Usambaras produce tobacco, which is processed into Coils and sold in Mombasa. It is handled by a cooperative society, which is financed by an assessment equivalent to about one-half U. S. cent per pound of leaf.

### Trade

The demand for flue-cured for cigarettes within British East Africa is sufficient to absorb more of the Tanganyika leaf as quality improves. The bulk of flue-cured is shipped to the United Kingdom, Netherlands, Egypt, Uganda and other nearby British territories. Much of that sent to Uganda is processed for sale in British East Africa.

In the past, some of the better quality fire-cured produced in the Songea area has been exported to the United Kingdom. Some of the fire-cured grown in the Lake and Western Province areas is sold locally with the remainder usually shipped to Uganda for processing by local factories for re-export. Small amounts of fire-cured leaf are usually shipped to Egypt, Netherlands, Zanzibar, and Somaliland.

Small amounts of Kali cigarettes and shag tobacco are manufactured in Tanganyika, but the bulk of these types of factory-made products are supplied from factories located in Uganda.

Some of the dark tobaccos produced in Tanganyika are sold directly to natives through native markets, but most of the production is shipped to the factories in Uganda for processing for consumption within British East Africa. Much of the Coil tobacco is sold locally.

It is estimated in a recent "Economic Survey of the Colonial Territories" that between 650,000 and 700,000 pounds of Coil (twist) tobacco were processed and consumed locally in 1951.

### Outlook

Production of flue-cured is likely to expand with increased domestic consumption and substitution of improved varieties for Amarello. Future export levels depend largely on U. K. policies and improvement in the quality of leaf produced. Production levels in the fire-cured industry are uncertain, but output in the immediate future is not expected to change materially. In the longer-run, foreign demand and the changing tastes of the natives are likely to be the major factors determining production required.

## TANGANYIKA

Shipments of unmanufactured tobacco to areas outside Tanganyika, 1938-52

| Year | Total | Destinations of Kenya, Uganda, Zanzibar and Somalia |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| 1938 | 546 | 492 |
| 1939 | 963 | 963 |
| 1940 | 1,086 | 958 |
| 1941 | 1,404 | 1,404 |
| 1942 | 1,703 | 1,106 |
| 1943 | 2,150 | 1,400 |
| 1944 | 2,512 | 2,017 |
| 1945 | 2,219 | 1,826 |
| 1946 | 2,078 | 860 |
| 1947 | 1,498 | 871 |
| 1948 | 3,186 | 1,742 |
| 1949 | 1/ 2,422 | 1/ 20 |
| 1950 | 1/ 2,602 | 1/ 68 |
| 1951 | 3,340 | 1,590 |
| 1952 | 1/ 1,436 | 1/ 11 |

1/ Does not include shipments from Tanganyika to Uganda and Kenya.

## UGANDA

Uganda has a land area of 80,300 square miles, about twice the size of Virginia. There was a total population of 5.2 million in 1951 of which less than two percent were non-natives.

### Production of Leaf Tobacco

Uganda has some relatively progressive native farmers who have long grown dark fire-cured and dark air-cured, but the production of flue-cured was started recently.

Most of the dark fire-cured is grown in the Bunyoro area (1.8 to 2.1 million pounds) with about 300,000 to 400,000 pounds produced around Mubende. Most of the fire-cured is grown on very small plots usually about one-half acre per family. Average yields are low, usually ranging from 350 to 500 pounds per acre, but yields below 300 pounds per acre are not unusual.

About seven-eighths of the dark air-cured (excluding nicotine) is produced in the West Nile, and one-eighth in the Mubende districts with very small amounts in Acholi. Trial crops have been grown successful at Rubaya in Kigezi district. High nicotine (Nicotiana Rustica) leaf is produced in the districts of Kigezi and Acholi. The yields of the high nicotine leaf are reported as averaging between 500 and 700 pounds per acre.

## UGANDA

Most of the flue-cured is grown on estates operated by a private tobacco company. The major portion of this kind of leaf is produced in the West Nile, Acholi, and Lango districts. The areas around the villages of Kigezi, Gulu, and Arua account for most of the output with a little at Otreru and Lira. Several years ago, yields often averaged from 400 to 500 pounds per acre, but recently yields have risen to 500 to 600 pounds per acre with some substantially higher. The quality of Uganda flue-cured is reported as fairly good, although none of the leaf from this area was seen by the author. Production of flue-cured is still low (about 900,000 pounds annually in the last two years) but output has expanded rapidly since the first commercial crop was grown in 1941-42. Output doubled from 300,000 pounds in 1949-50 to over 600,000 pounds in 1950-51 and is expected to continue to increase in the next few years. Most of the production has been of the Jamaica Wrapper and White Stem Orinoco varieties.

Uganda: Production of unmanufactured tobacco by kind, 1935-53
(farm sales weight)

| Year | Flue-Cured | | Fire-Cured | | Air-Cured excluding high Nicotine | | High Nicotine | |
|---|---|---|---|---|---|---|---|---|
| | Acreage | Production | Acreage | Production | Acreage | Production | Acreage | Production |
| | acres | 1,000 pounds | acres | 1,000 pounds | acres | 1,000 pounds | acres | 1,000 pounds |
| 1935-39 | none | none | 2,902 | 1,294 | 984 | 206 | 1/ | 1/ |
| 1939-40 | 1/ | 1/ | 2,672 | 1,277 | 296 | 47 | 1/ | 1/ |
| 1940-41 | 1/ | 1/ | 4,250 | 1,709 | 338 | 71 | 1/ | 1/ |
| 1941-42 | 60 | 26 | 8,134 | 3,205 | 462 | 102 | 1/ | 1/ |
| 1942-43 | 55 | 18 | 8,783 | 3,750 | 240 | 84 | 1/ | 1/ |
| 1943-44 | 86 | 20 | 3,539 | 1,440 | 171 | 31 | 1/ | 1/ |
| 1944-45 | 47 | 14 | 4,862 | 2,096 | 231 | 44 | 534 | 323 |
| 1945-46 | 60 | 18 | 4,980 | 1,633 | 275 | 77 | 1/ | 524 |
| 1946-47 | 141 | 28 | 4,754 | 1,612 | 249 | 81 | 1/ | 956 |
| 1947-48 | 264 | 2/ 100 | 7,595 | 2,793 | 431 | 170 | 1/ | 1,660 |
| 1948-49 | 1/ | 134 | 6,640 | 2,296 | 1/ | 255 | 1/ | 1,684 |
| 1949-50 | 579 | 300 | 6,172 | 2,325 | 1,595 | 380 | 1/ | 1,200 |
| 1950-51 | 1,087 | 608 | 3,670 | 1,644 | 1,254 | 535 | 2,065 | 896 |
| 1951-52 | 1,669 | 605 | 4,474 | 1,913 | 1,624 | 473 | 1,863 | 479 |
| 1952-53 | 1,751 | 945 | 4,553 | 2,386 | 1,439 | 401 | 1/ | 1/ |
| 1953-54 | 1/ | 880 | 1/ | 2,500 | 1/ | 400 | 1/ | 1/ |

1/ Not available.
2/ Estimated.

Production by kind in Uganda by districts, 1952-53 crop
(farm sales weight)

| District | Flue-Cured | Fire-Cured | Air-Cured |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| West Nile | 617 | - | 1/ 350 |
| Acholi | 302 | - | 1 |
| Lungo | 26 | - | - |
| Bunyoro | - | 2,100 | - |
| Mubene | - | 286 | 50 |
| Total | 945 | 2,386 | 401 |

1/ Only 287,836 pounds were sold in the district, but considerable amounts were reported as sold elsewhere.

## UGANDA

### Manufacturing and Trade

In addition to tobacco produced locally, the Uganda factories ordinarily use leaf from Tanganyika, United States, India, Southern Rhodesia, and Nyasaland. As indicated earlier, most of the tobacco products consumed in British East Africa are manufactured in Uganda in plants at Kampala and Jinga on Lake Victoria. Products are shipped to Kenya, Tanganyika, Zanzibar, and Belgian Congo. Exports to the Belgian Congo have been falling and will continue to decline as production facilities in that area expand further. Shipments to Kenya are likely to decline as the facilities under construction in Nairobi in 1954 come into production.

## ZANZIBAR

Zanzibar is a fairly small island of 1,020 square miles and a population of about 200,000. About 95 percent of the population are native Africans with the remaining 5 percent mostly Asians of Indian descent.

Zanzibar is of interest largely as an importer of tobacco and tobacco products rather than as a producer of leaf tobacco. Some tobacco is produced, but the amount is not known. The Clove Growers Association, which has the financial support of the Government has the responsibility of providing marketing facilities for tobacco as well as for the marketing of numerous other products.

### Imports of Unmanufactured Tobacco

Most of the imported leaf is from Tanganyika with small quantities from India, Arabia, and Aden.

### Leaf Exports

Small quantities of unmanufactured dark tobacco are exported or re-exported. All of this is reported as shipped to Italian Somalia.

### Imports of Manufactured Products

Relatively large quantities of cigarettes are imported from the United Kingdom and Uganda. Also, coil tobacco, pipe tobacco, cheroots, and snuff are imported.

### Re-exports of Tobacco Products

Zanzibar re-exports significant quantities of cigarettes to nearby areas. Some coil tobacco is reported as exported or re-exported to Italian Somalia. Also, fairly large quantities of imported cigarettes are shipped to Zanzibar for sale to ships calling there. Some of the latter are classed as "in transit" and are therefore not reported as re-exports.

### Import Duties

Import duties even on products are relatively low. They are probably kept low in order to stimulate consumption as well as the re-export business.

Zanzibar: Exports of unmanufactured tobacco, 1942-1951

| Country | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | | | | | |
| Italian Somalia | 54 | 93 | 38 | 65 | 109 | 55 | 129 | 151 | 13 | 11 |

Source: Zanzibar Annual Trade Report.

## ZANZIBAR

Zanzibar: Re-exports of manufactured tobacco, 1944-51

| Commodity | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 |
|---|---|---|---|---|---|---|---|---|
| | - - - - - - - - - | - - - - | - - - - | 1,000 pounds | - - - - | - - - - | - - - - | - - - - |
| Cigarettes | 8 | 2 | 2 | 10 | 8 | 8 | 15 | 17 |

Source: Zanzibar Annual Trade Report.

Zanzibar: Imports of unmanufactured tobacco and tobacco products by country of origin, 1943-51

| Commodity and Country | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 |
|---|---|---|---|---|---|---|---|---|---|
| | - - - - | - - - - | - - - - | - - - - | 1,000 pounds | - - - - | - - - - | - - - - | - - - - |
| Unmanufactured Tobacco | | | | | | | | | |
| India | 5 | 1 | 1 | 1 | 2 | 2 | 2 | 3 | 2 |
| Tanganyika | 64 | 68 | 12 | 37 | 56 | 32 | 14 | 66 | 20 |
| Arabia | 2 | 11 | 2 | 4 | 6 | 2 | 6 | 2 | 2 |
| Other Countries | - | - | - | - | - | 1 | - | 2 | 2 |
| Total | 71 | 80 | 15 | 42 | 64 | 37 | 22 | 73 | 26 |
| Cigarettes | | | | | | | | | |
| United Kingdom | 92 | 62 | 45 | 41 | 107 | 116 | 197 | 136 | 203 |
| Uganda | 78 | 117 | 130 | 251 | 133 | 67 | 39 | 33 | 43 |
| Other Countries | 2 | 2 | 2 | 1/ | 1/ | - | - | - | 3 |
| Total | 172 | 181 | 177 | 292 | 240 | 183 | 236 | 169 | 249 |
| Other Manufactured Tobacco Products | | | | | | | | | |
| United Kingdom | - | 2 | 1/ | 1/ | 1/ | 1/ | 1 | 1/ | 1 |
| Uganda | 34 | 27 | 15 | 34 | 10 | 1 | - | - | - |
| Tanganyika | 9 | 4 | 15 | 3 | 1 | - | - | 1/ | 1/ |
| India | 4 | 2 | 1/ | 1 | 1 | 2 | 3 | 1/ | 1 |
| Netherlands | - | - | - | - | 14 | 26 | 17 | 17 | 28 |
| Other Countries | 1 | 1/ | 1/ | 1/ | - | - | - | - | 1/ |
| Total | 48 | 35 | 30 | 38 | 26 | 29 | 21 | 17 | 30 |

1/ Less than 500

Source: Zanzibar Annual Trade Report No.270212

Zanzibar: Duties on tobacco and tobacco products imported

| Commodity | Local Currency per pound | U. S. Currency per pound 1/ |
|---|---|---|
| | Shilling | Cents |
| Unmanufactured tobacco | 3 per 100 lbs. | .042 |
| Cigarettes | 14.0 | 196.0 |
| Cigars, Cheroots, and Cigarillos | 14.0 | 196.0 |
| Snuff | 0.8 | 11.2 |
| Other | 14.0 | 196.0 |

1/ Converted to U. S. currency on the basis of one local pound equivalent to $2.80 U. S.

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## TOBACCO PRODUCTION IN THE NORTHERN HEMISPHERE FOR HARVEST IN THE SECOND HALF OF THE CALENDAR YEAR, 1954--FARM SALES WEIGHT

Total production of tobacco for harvest in the second half of 1954 in the Northern Hemisphere countries specified in the tables below is estimated at 5.60 billion pounds as compared to 5.46 billion for these same countries in 1953.

The largest increases as compared to 1953 are for the United States, Japan, Korea, China, and Canada with fairly substantial increases also for Greece, Algeria, Iraq, Germany, Syria, and Spain. The greatest declines are anticipated for Turkey and Iran.

### North America

Although the acreage of tobacco in the United States was reduced slightly in 1954, the output is now estimated at 2.1 billion pounds or 48 million pounds above that of 1953.

The 1954 Canadian production is estimated at 158 million pounds or 19 million pounds above the 1953 level with the anticipated output establishing a new all time high. The acreage planted to tobacco in Canada in 1954 was about 28 percent above the 1953 level, and recent rains in Ontario have substantially raised the estimates of output from the level predicted earlier.

### Caribbean

The expected output in Puerto Rico at 34.1 million pounds is approximately the same as in 1953, but well above the 1947-51 average.

### Europe

The 1954 production of Western Europe is estimated at 602.1 million pounds or 2 percent above 1953. This represents a continuation of the upward trend in Greece, Germany, Spain, and Yugoslavia. The largest anticipated increase in Western Europe is for Greece, where the acreage planted in 1954 was about one-eighth above that of 1953, but yields in Greece are expected to be well below those of recent years; thus, decreasing the level of output predicted earlier.

In the accompanying tables, the 1954 production estimates for "Iron Curtain" countries, with the exception of Rumania, where weather conditions were unfavorable, remain the same as those of 1953, but these are largely guesses as we have very little information on these areas.

## Asia

The 1954 production of Japan, Korea, Syria, and Iraq are expected to be substantially larger than in 1953. Much of the increase in Korea is due to better weather which was extremely unfavorable in 1953, but part of the increase is due to the greater acreage planted in 1954. The large increase in Japan is due to greater acreages and anticipated yields and represents a continuation of the expansion program begun after the end of World War II. The 1954 output for Turkey and Iran are expected to be well below 1953 levels. The anticipated decline in Turkey is chiefly due to decreased output in the Aegean area because of dry weather, but rains after the date on which this report from this area was made could materially change the outlook.

## Africa

The 1954 output in Algeria is expected to be well above that of 1953 and indicates a continuation of the upward trend initiated after World War II. The production predicted for French Morocco is about the same as for 1953, but more than four times the 1947-51 average. The estimated output for Tunisia is slightly below that of 1953.

## Production by Kind

Flue-cured tobacco output in these specified countries is estimated at 2,021 million pounds in 1954 as compared to 1,886 million in 1953. Most of the increase is in the United States, Japan, Canada, Korea and China.

The estimated production of Burley tobacco for 1954 is 605 million pounds, which is below 1953 by 21 million pounds or 3.5 percent. Practically all of the decline is due to the lower estimated output in the United States and Spain. Production in Italy is expected to be about one-fourth larger than in 1953. Iraq's first report indicates tobacco by kind, which includes 3.5 million pounds of Burley.

Other light air-cured tobacco, including Maryland, is estimated at 126.5 million pounds, only slightly below that of 1953, but well above the 1947-51 average. The decline for 1954 as compared to 1953 is due to lower estimates for Maryland leaf produced in the U. S. and Italy.

The output of light sun-cured leaf harvested in the second half of 1954 is estimated at 582 million pounds, which is 37 million pounds or 6.7 percent above 1953. Most of the expansion is accounted for by Korea and Algeria.

Dark sun-cured tobacco production continued to decline with an estimate of 109.3 million pounds for 1954 as compared to 113.4 million in 1953. The only increase was in Virginia sun-cured leaf produced in the U. S., while estimated production indicates declines for Algeria and Iran.

Dark air-cured production for 1954 is estimated at 1,314 million pounds, about 2.5 percent above the 1953 level, but 6 percent below the 1947-51 average. There are fairly large increases forecast for Japan, Spain, U. S., Germany and Algeria. Dark air-cured production in Spain has been rising rapidly and the

47.6 million forecast for 1954 is over 25 percent above the high level of 1953. Similarly, the output of "native" dark air-cured in Japan continues to increase in accordance with the Japanese Monopoly program initiated after the end of World War II.

Dark fire-cured leaf for harvest in these specified countries is estimated at 84.0 million pounds or 6 percent above 1953, but well below the average annual output of 122 million pounds produced in the 1947-51 period. Anticipated 1954 output of both Virginia and Kentucky-Tennessee leaf in the U. S. are above 1953 levels; while output in Italy is expected to be about 3.4 million pounds below that of 1953.

The estimated output of 755 million pounds of Oriental tobacco in these specified countries for 1954 is 3.2 percent below the 1953 level. The planted acreages reflect a continuation of the expansion in Greece. Increases are indicated for Greece, Syria, and Iraq. The estimated out-turns indicate declines for Turkey, Iran, Italy, and Rumania. The estimated 1954 output for Greece is 141 million pounds as compared to 134.5 million in 1953; while anticipated production in Turkey is 221 million this year compared to 248 million in last year. The present forecast indicates a large decrease in production in the Aegean area of Turkey due to unfavorable weather, but timely rains since the report on which this is based was made could substantially change the outlook.

LEAF TOBACCO: Estimated Production by Kind Harvested in the Second Half of Calendar Year 1954 with Comparison--Farm Sales Weight 1/

| Kinds | Averages 1935-39 | Averages 1947-51 | 1953 2/ | 1954 2/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-Cured | 1,176,784 | 1,745,194 | 1,885,502 | 2,020,686 |
| Burley | 337,843 | 599,024 | 626,451 | 604,750 |
| Other Light Air-Cured | 99,754 | 117,075 | 129,917 | 126,548 |
| Light Sun-Cured | 550,283 | 606,590 | 545,336 | 582,013 |
| Dark Air-Cured | 1,361,316 | 1,396,573 | 1,281,111 | 1,313,525 |
| Dark Sun-Cured | 108,957 | 141,092 | 113,413 | 109,326 |
| Fire-Cured | 143,948 | 122,082 | 79,358 | 84,025 |
| Oriental | 643,321 | 708,036 | 780,025 | 755,405 |
| Total | 3/ 4,430,263 | 4/ 5,447,394 | 5/ 5,456,988 | 5,596,278 |

1/ Farm sales weight is about 10 percent above dry weight normally reported in manufacturing and export statistics. 2/ Preliminary. 3/ Includes Iraq -- 8,057 thousand pounds -- no types shown. 4/ Includes Iraq -- 11,728 thousand pounds -- no types shown. 5/ Includes Iraq -- 15,875 thousand pounds -- no types shown.

LEAF TOBACCO: Estimated Acreage, Yield and Production of Specified North Temperate Zone Countries
Harvested in the Second Half of Calendar Year 1954 with Comparison — Farm Sales Weight 1/

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 2/ | 1954 2/ | 1935-39 | 1947-51 | 1953 2/ | 1954 2/ | 1935-39 | 1947-51 | 1953 2/ | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 69 | 113 | 101 | 129 | 1,103 | 1,144 | 1,377 | 1,225 | 76,556 | 129,445 | 139,190 | 158,020 |
| United States | 1,647 | 1,682 | 1,634 | 1,632 | 887 | 1,258 | 1,259 | 1,239 | 1,460,054 | 2,082,727 | 2,057,221 | 2,105,021 |
| Puerto Rico | 44 | 35 | 36 | 41 | 673 | 769 | 976 | 840 | 23,393 | 26,921 | 34,325 | 34,140 |
| Total North America | 1,760 | 1,830 | 1,771 | 1,802 | - | - | - | - | 1,560,003 | 2,239,093 | 2,230,736 | 2,297,181 |
| EUROPE: | | | | | | | | | | | | |
| Belgium | 6 | 5 | 5 | 4 | 2,500 | 1,924 | 1,838 | 1,884 | 16,431 | 9,432 | 9,041 | 8,378 |
| France | 44 | 70 | 70 | 70 | 1,676 | 1,557 | 1,650 | 1,650 | 72,995 | 109,070 | 104,000 | 104,000 |
| Western Germany 3/ | 33 | 23 | 27 | 30 | 2,254 | 2,185 | 2,023 | 2,000 | 74,355 | 46,982 | 55,000 | 60,000 |
| Greece | 226 | 213 | 217 | 263 | 589 | 531 | 621 | 537 | 132,819 | 113,320 | 134,480 | 141,044 |
| Italy | 77 | 142 | 123 | 121 | 1,175 | 1,179 | 1,042 | 1,263 | 90,500 | 167,900 | 150,973 | 149,804 |
| Spain | 4/ 16 | 28 | 50 | 55 | 4/ 1,100 | 1,244 | 1,200 | 1,250 | 4/ 17,322 | 34,425 | 66,000 | 68,563 |
| Sweden | 1 | 1 | 5/ | 5/ | 1,735 | 1,526 | 1,400 | 1,650 | 1,061 | 859 | 550 | 660 |
| Switzerland | 1 | 3 | 3 | 2 | 1,571 | 1,844 | 2,100 | 1,700 | 2,276 | 4,689 | 4,140 | 3,527 |
| Yugoslavia | 39 | 89 | 84 | 85 | 969 | 673 | 777 | 778 | 37,410 | 59,622 | 65,252 | 66,138 |
| Total Western Europe | 443 | 574 | 579 | 630 | - | - | - | - | 445,169 | 546,299 | 589,436 | 602,114 |
| Albania 6/ | 5 | 5 | 4 | 4 | 800 | 1,000 | 750 | 750 | 4,082 | 5,000 | 3,000 | 3,000 |
| Bulgaria 6/ | 94 | 72 | 65 | 65 | 809 | 1,030 | 1,000 | 1,000 | 75,871 | 75,871 | 65,000 | 65,000 |
| Czechoslovakia 6/ | 24 | 15 | 20 | 20 | 1,288 | 1,280 | 1,000 | 1,000 | 31,143 | 17,950 | 20,000 | 20,000 |
| Hungary 6/ | 37 | 39 | 50 | 50 | 1,238 | 1,102 | 800 | 800 | 45,872 | 42,990 | 40,000 | 40,000 |
| Poland 6/ | 17 | 33 | 40 | 40 | 1,664 | 1,324 | 1,125 | 1,125 | 25,566 | 43,703 | 45,000 | 45,000 |
| Rumania 6/ | 44 | 66 | 82 | 82 | 647 | 513 | 514 | 500 | 28,697 | 35,935 | 42,200 | 39,300 |
| Total Eastern Europe | 221 | 230 | 261 | 261 | - | - | - | - | 211,231 | 221,449 | 215,200 | 212,300 |
| Total Europe Excl. U.S.S.R. 6/ | 664 | 804 | 840 | 891 | - | - | - | - | 656,400 | 767,748 | 804,636 | 814,414 |
| U. S. S. R.: | 4/ 490 | 520 | 520 | 520 | 4/ 1,129 | 865 | 865 | 865 | 4/ 525,000 | 450,000 | 450,000 | 450,000 |
| ASIA: | | | | | | | | | | | | |
| Iran | 35 | 40 | 67 | 55 | 900 | 722 | 609 | 589 | 34,542 | 29,355 | 40,829 | 32,187 |
| Iraq | 4/ 11 | 10 | 19 | 21 | 4/ 752 | 1,137 | 853 | 850 | 4/ 8,057 | 11,728 | 15,875 | 17,637 |
| Lebanon | 4 | 4/ 5 | 6 | 6 | 600 | 4/ 705 | 600 | 640 | 2,350 | 4/ 3,525 | 3,827 | 3,850 |
| Syria | 11 | 4/ 16 | 12 | 15 | 730 | 4/ 719 | 706 | 694 | 8,250 | 4/ 11,510 | 8,197 | 11,310 |
| Turkey | 194 | 304 | 390 | 390 | 661 | 638 | 640 | 570 | 128,505 | 194,109 | 250,162 | 223,000 |
| China 7/ | 1,228 | 4/1,402 | 1,400 | 1,410 | 1,021 | 4/1,017 | 950 | 950 | 1,254,539 | 4/1,425,000 | 1,330,000 | 1,340,000 |
| Japan | 92 | 129 | 160 | 172 | 1,621 | 1,619 | 1,455 | 1,558 | 148,680 | 208,092 | 224,417 | 270,000 |
| Korea | 46 | 4/ 44 | 35 | 51 | 1,239 | 4/1,302 | 938 | 1,242 | 57,304 | 4/ 59,080 | 32,848 | 63,930 |
| Total Asia | 1,621 | 1,950 | 2,089 | 2,120 | - | - | - | - | 1,642,227 | 1,942,399 | 1,906,155 | 1,961,914 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 56 | 75 | 64 | 72 | 691 | 595 | 890 | 900 | 38,667 | 44,671 | 57,000 | 64,595 |
| French Morocco | 1 | 1 | 5 | 5 | 1,040 | 1,027 | 1,130 | 1,246 | 704 | 1,278 | 5,529 | 5,529 |
| Tunisia | 1 | 2 | 4 | 4 | 1,200 | 1,100 | 733 | 712 | 1,262 | 2,205 | 2,932 | 2,645 |
| Total Africa | 58 | 78 | 73 | 81 | - | - | - | - | 40,633 | 48,154 | 65,461 | 72,769 |
| Total Excluding Eastern Europe | 4,372 | 4,952 | 5,032 | 5,153 | - | - | - | - | 4,219,032 | 5,225,945 | 5,241,788 | 5,383,978 |
| Total | 4,593 | 5,182 | 5,293 | 5,414 | - | - | - | - | 4,430,263 | 5,447,394 | 5,456,988 | 5,596,278 |

1/ Farm sales weight is about 10 percent above the average dry weight which is normally reported in export trade statistics. 2/ Preliminary. 3/ In the case of Germany, data are for Western Germany only. 4/ Less than a 5-year average. 5/ Less than 500 acres. 6/ Estimated from unofficial information for all periods except 1935-39. 7/ Does not include Manchuria.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research and other information.

FLUE-CURED TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries
Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 51 | 98 | 96 | 121 | 1,070 | 1,142 | 1,382 | 1,231 | 54,616 | 111,646 | 132,352 | 149,000 |
| United States | 981 | 1,010 | 1,022 | 1,039 | 876 | 1,229 | 1,245 | 1,280 | 863,619 | 1,246,160 | 1,272,200 | 1,330,402 |
| EUROPE: | | | | | | | | | | | | |
| Western Germany | - | 2/ | 2/ | 2/ | - | 2/ | 2/ | 2/ | - | 1,500 | 9,000 | 9,000 |
| Italy | | | | | | | | | | | | |
| Bright Italia | 2 | 8 | 14 | 15 | 1,900 | 1,963 | 1,717 | 1,860 | 3,800 | 16,100 | 24,321 | 27,145 |
| Spain | - | 2/ | 2/ | 2/ | - | 2/ | 2/ | 2/ | - | 800 | 1,200 | 662 |
| Switzerland | - | - | - | - | - | - | - | - | - | - | - | 1,327 |
| Poland | 5 | 10 | 12 | 12 | 1,534 | 1,311 | 1,163 | 1,163 | 7,670 | 13,111 | 13,500 | 13,500 |
| ASIA: | | | | | | | | | | | | |
| Turkey | - | - | 2/ | 2/ | - | - | 500 | 600 | - | - | 1,014 | 1,200 |
| China | 150 | 302 | 300 | 300 | 1,006 | 830 | 967 | 1,000 | 150,900 | 250,000 | 290,000 | 300,000 |
| Japan | | | | | | | | | | | | |
| Virginia Yellow | 46 | 58 | 98 | 110 | 1,616 | 1,500 | 1,288 | 1,472 | 74,340 | 86,887 | 126,703 | 162,000 |
| Korea | 15 | 13 | 13 | 21 | 1,456 | 1,400 | 1,170 | 1,241 | 21,839 | 18,990 | 15,212 | 26,450 |
| Total | - | - | - | - | - | - | - | - | 1,176,784 | 1,745,194 | 1,885,502 | 2,020,686 |

See footnotes at end of circular.

LIGHT AIR-CURED BURLEY TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries
Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 9 | 8 | 1 | 3 | 1,195 | 1,183 | 1,560 | 1,167 | 10,749 | 10,040 | 1,709 | 3,600 |
| United States | 372 | 433 | 423 | 396 | 839 | 1,277 | 1,348 | 1,376 | 315,826 | 552,736 | 569,868 | 545,247 |
| EUROPE: | | | | | | | | | | | | |
| Germany | - | 2/ | 2/ | 2/ | - | 2/ | 2/ | 2/ | - | 5,500 | 6,500 | 7,000 |
| Italy | 2 | 6 | 6 | 8 | 2,200 | 2,283 | 2,411 | 2,406 | 4,600 | 13,700 | 15,571 | 19,994 |
| Spain | | | | | | | | | | | | |
| Burley & Other Light Air-Cured | 2/ | 2/ | 2/ | 2/ | 2/ | 2/ | 2/ | 2/ | 3,000 | 6,425 | 26,800 | 20,282 |
| Switzerland | | | | | | | | | | | | |
| Burley & Other Light Air-Cured | 2/ | 2/ | 2/ | - | 2/ | 2/ | 2/ | 2/ | 694 | 1,641 | 1,852 | 1,100 |
| ASIA: | | | | | | | | | | | | |
| Iraq | - | - | - | - | - | - | - | - | - | - | - | 3,527 |
| Japan | 2 | 5 | 2 | 2 | 1,480 | 1,734 | 1,948 | 2,000 | 2,974 | 8,982 | 4,151 | 4,000 |
| Total | - | - | - | - | - | - | - | - | 337,843 | 599,024 | 626,451 | 604,750 |

See footnotes at end of circular.

## OTHER LIGHT AIR-CURED TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | | | | | | | | | | | | |
| Maryland | 37 | 49 | 45 | 46 | 769 | 795 | 825 | 750 | 28,845 | 39,112 | 37,125 | 34,500 |
| EUROPE: | | | | | | | | | | | | |
| Italy | | | | | | | | | | | | |
| Maryland | 1 | 3 | 4 | 4 | 2,500 | 2,600 | 2,453 | 2,241 | 3,400 | 7,800 | 9,475 | 8,168 |
| Switzerland | 2/ | 2/ | 2/ | 2/ | 2/ | 2/ | 2/ | 2/ | 582 | 1,407 | 436 | — |
| Yugoslavia | 2 | 4 | 4 | 4 | 935 | 580 | 582 | 606 | 1,870 | 12,981 | 23,252 | 24,251 |
| Czechoslovakia | 1 | 1 | 1 | 1 | 900 | 900 | 920 | 920 | 1,557 | 897 | 1,000 | 1,000 |
| U.S.S.R. | 59 | 62 | 62 | 62 | 1,068 | 900 | 900 | 900 | 63,000 | 54,000 | 54,000 | 54,000 |
| AFRICA: | | | | | | | | | | | | |
| French Morocco | | | | | | | | | | | | |
| Maryland | 2/ | 1 | 4 | 4 | 800 | 1,100 | 1,200 | 1,200 | 500 | 878 | 4,629 | 4,629 |
| Total | - | - | - | - | - | - | - | - | 99,754 | 117,075 | 129,917 | 126,548 |

See footnotes at end of circular.

## FIRE-CURED TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | | | | | | | | | | | | |
| Virginia Fire-Cured | 23 | 11 | 10 | 10 | 810 | 1,165 | 930 | 1,200 | 18,804 | 13,005 | 9,207 | 12,000 |
| Kentucky-Tennessee | 105 | 51 | 38 | 40 | 813 | 1,124 | 985 | 1,184 | 84,733 | 56,803 | 39,710 | 44,972 |
| EUROPE: | | | | | | | | | | | | |
| Italy | 25 | 37 | 21 | 18 | 1,596 | 1,378 | 1,414 | 1,449 | 39,900 | 51,400 | 29,541 | 26,153 |
| Poland | 3/ | 1 | 1 | 1 | 800 | 875 | 900 | 900 | 511 | 874 | 900 | 900 |
| Total | - | - | - | - | - | - | - | - | 143,948 | 122,082 | 79,358 | 84,025 |

See footnotes at end of circular.

LIGHT SUN-CURED TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| ASIA: | | | | | | | | | | | | |
| China 5/ | 491 | 525 | 500 | 500 | 1,022 | 1,048 | 1,000 | 1,000 | 501,818 | 550,000 | 500,000 | 500,000 |
| Korea | 31 | 31 | 22 | 30 | 1,145 | 1,293 | 802 | 1,243 | 35,465 | 40,090 | 17,636 | 37,480 |
| Iraq | - | - | - | 2/ | - | - | - | 2/ | - | - | - | 7,055 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 20 | 28 | 24 | 2/ | 660 | 690 | 735 | 2/ | 13,000 | 16,500 | 27,700 | 37,478 |
| Total | - | - | - | - | - | - | - | - | 550,283 | 606,590 | 545,336 | 582,013 |

See footnotes at end of circular.

DARK SUN-CURED TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | 3 | 3 | 4 | 5 | 844 | 1,012 | 790 | 925 | 2,769 | 3,330 | 2,923 | 4,255 |
| ASIA: | | | | | | | | | | | | |
| Iran | | | | | | | | | | | | |
| Pipe | 14 | 9 | 6 | 5 | 990 | 867 | 892 | 892 | 14,370 | 7,862 | 5,290 | 4,409 |
| China 4/ | 86 | 125 | 100 | 100 | 1,021 | 1,000 | 1,000 | 1,000 | 87,818 | 125,000 | 100,000 | 100,000 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 7 | 7 | 8 | 2/ | 600 | 514 | 600 | 2/ | 4,000 | 4,900 | 5,200 | 662 |
| Total | - | - | - | - | - | - | - | - | 108,957 | 141,092 | 113,413 | 109,326 |

See footnotes at end of circular.

DARK AIR-CURED TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries
Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | | | | | | | | | | | | |
| Cigar | 4 | 4 | 3 | 4 | 1,243 | 1,230 | 1,277 | 1,069 | 5,102 | 5,000 | 3,830 | 4,000 |
| Other | 5 | 3 | 1 | 1 | 1,060 | 1,051 | 1,083 | 947 | 6,089 | 2,759 | 1,299 | 1,420 |
| United States | | | | | | | | | | | | |
| One Sucker | 21 | 17 | 15 | 13 | 844 | 1,138 | 1,106 | 1,219 | 18,959 | 19,228 | 16,368 | 16,460 |
| Green River | 19 | 10 | 7 | 7 | 838 | 1,082 | 970 | 1,125 | 15,788 | 11,147 | 7,275 | 7,988 |
| Cigar Filler | 42 | 43 | 29 | 31 | 1,273 | 1,517 | 1,409 | 1,384 | 53,575 | 64,583 | 40,430 | 42,640 |
| Cigar Binder | 34 | 40 | 29 | 32 | 1,462 | 1,536 | 1,614 | 1,603 | 47,836 | 61,065 | 47,291 | 50,486 |
| Cigar Wrapper | 10 | 14 | 12 | 13 | 955 | 1,064 | 1,201 | 1,231 | 9,108 | 15,233 | 14,656 | 15,881 |
| Perique | 3/ | 1 | 3/ | 3/ | 454 | 646 | 670 | 760 | 192 | 325 | 168 | 190 |
| Puerto Rico | 44 | 35 | 36 | 41 | 673 | 769 | 976 | 840 | 29,393 | 26,921 | 34,325 | 34,140 |
| EUROPE: | | | | | | | | | | | | |
| Belgium | 6 | 5 | 5 | 4 | 2,500 | 1,924 | 1,838 | 1,884 | 16,431 | 9,432 | 9,041 | 8,378 |
| France | | | | | | | | | | | | |
| Lege | 40 | 67 | 68 | 68 | 1,665 | 1,550 | 1,645 | 1,705 | 65,700 | 103,570 | 102,421 | 102,000 |
| Other | 4 | 3 | 2 | 2 | 1,800 | 1,750 | 1,800 | 1,800 | 7,295 | 5,500 | 1,579 | 2,000 |
| Germany | | | | | | | | | | | | |
| Cigar (Havana & Guerdentheimer) | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 41,000 | 25,800 | 28,000 | 32,000 |
| Other | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 33,355 | 14,182 | 11,500 | 12,000 |
| Italy | | | | | | | | | | | | |
| Beneventano | 3 | 6 | 7 | 7 | 1,433 | 1,161 | 1,267 | 1,126 | 4,300 | 7,200 | 9,259 | 8,101 |
| Nostrano | 2 | 5 | 8 | 8 | 1,458 | 1,540 | 1,543 | 1,778 | 3,500 | 7,700 | 13,051 | 15,040 |
| Blending | 1 | 1 | 3/ | 3/ | 760 | 500 | 514 | 380 | 500 | 200 | 15 | 11 |
| Snuff & Nicotine | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 600 | 900 | 220 | 454 |
| Sub-Tropical | 1 | 7 | 4 | 4 | 1,500 | 1,515 | 1,367 | 1,394 | 1,600 | 10,000 | 5,399 | 5,853 |
| Spain | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 14,322 | 27,200 | 38,000 | 47,619 |
| Sweden | 1 | 1 | 1 | 1 | 1,735 | 1,526 | 1,400 | 1,650 | 1,061 | 859 | 550 | 660 |
| Switzerland | | | | | | | | | | | | |
| Nostrano | 1 | 1 | 1 | 1 | 1,000 | 1,200 | 1,400 | 1,500 | 1,000 | 1,641 | 1,852 | 1,100 |
| Yugoslavia | | | | | | | | | | | | |
| Cigar & Dark Air-Cured | 8 | 18 | 14 | 14 | 936 | 662 | 643 | 630 | 7,483 | 11,924 | 9,000 | 8,818 |
| Albania | 5 | 5 | 4 | 4 | 800 | 1,000 | 750 | 750 | 4,082 | 5,000 | 3,000 | 3,000 |
| Czechoslovakia | 13 | 8 | 11 | 11 | 1,600 | 1,680 | 1,365 | 1,365 | 23,357 | 13,463 | 15,000 | 15,000 |
| Hungary | 33 | 35 | 45 | 45 | 1,250 | 1,105 | 800 | 800 | 41,285 | 38,691 | 36,000 | 36,000 |
| Poland | 11 | 21 | 26 | 26 | 1,510 | 1,350 | 1,125 | 1,125 | 16,618 | 28,407 | 29,250 | 29,250 |
| Rumania | 7 | 10 | 12 | 12 | 610 | 540 | 550 | 442 | 4,305 | 5,391 | 6,330 | 5,300 |
| U.S.S.R. | | | | | | | | | | | | |
| Mahorka | 230 | 244 | 244 | 244 | 1,075 | 869 | 869 | 869 | 247,000 | 212,000 | 212,000 | 212,000 |
| Cigar | 20 | 22 | 22 | 22 | 1,050 | 818 | 818 | 818 | 21,000 | 18,000 | 18,000 | 18,000 |
| ASIA: | | | | | | | | | | | | |
| Iran | | | | | | | | | | | | |
| Tumbeki (water pipe) | 6 | 3 | 2 | 2 | 1,460 | 1,322 | 1,338 | 535 | 9,772 | 3,993 | 2,977 | 1,984 |
| Lebanon | | | | | | | | | | | | |
| Tombac | - | - | - | - | - | - | - | - | - | - | 93 | 90 |
| Syria | | | | | | | | | | | | |
| Tombac | 1 | 1 | 1 | 1 | 800 | 805 | 500 | 550 | 820 | 800 | 560 | 662 |
| Turkey | 1 | 1 | 1 | 1 | 350 | 350 | 500 | 500 | 386 | 360 | 877 | 1,000 |
| China (cigar type) | 501 | 500 | 500 | 500 | 1,026 | 1,000 | 850 | 850 | 514,003 | 500,000 | 440,000 | 440,000 |
| Japan (native) | 44 | 66 | 59 | 60 | 1,621 | 1,505 | 1,576 | 1,733 | 71,366 | 112,223 | 93,563 | 104,000 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 29 | 40 | 32 | 32 | 750 | 580 | 750 | 827 | 21,667 | 23,271 | 24,100 | 26,455 |
| Tunisia | | | | | | | | | | | | |
| Arbi | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 360 | 650 | 900 | 1,543 |
| Souffi | 2/ | 2/ | 2/ | 2/ | - | - | - | - | 902 | 1,555 | 2,032 | 1,102 |
| French Morocco | 3/ | 3/ | 1 | 1 | - | - | 1,548 | 1,548 | 204 | 400 | 900 | 900 |
| Total | - | - | - | - | - | - | - | - | 1,361,316 | 1,396,573 | 1,281,111 | 1,313,525 |

See footnotes at end of circular.

ORIENTAL TOBACCO: Estimated Acreage, Yield and Production in North Temperate Zone Countries Harvested in Second Half of Calendar Year 1954 with Comparison

| Continent and Country | Acreage Harvested | | | | Yield Per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ | 1935-39 | 1947-51 | 1953 1/ | 1954 1/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | pounds | pounds | pounds | pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| EUROPE: | | | | | | | | | | | | |
| Greece | 226 | 213 | 217 | 263 | 589 | 531 | 621 | 537 | 132,819 | 113,320 | 134,480 | 141,044 |
| Italy | 40 | 69 | 58 | 56 | 725 | 762 | 764 | 697 | 28,300 | 52,900 | 44,121 | 38,885 |
| Yugoslavia | 29 | 67 | 64 | 65 | 966 | 503 | 516 | 509 | 28,057 | 34,717 | 33,000 | 33,069 |
| Bulgaria | 94 | 6/ 72 | 65 | 65 | 809 | 1,030 | 1,000 | 1,000 | 75,871 | 6/ 75,871 | 65,000 | 65,000 |
| Czechoslovakia | 10 | 6 | 8 | 8 | 630 | 600 | 550 | 550 | 6,229 | 3,590 | 4,000 | 4,000 |
| Hungary | 4 | 4 | 5 | 5 | 1,150 | 1,075 | 800 | 800 | 4,587 | 4,299 | 4,000 | 4,000 |
| Poland | 1 | 1 | 1 | 1 | 750 | 1,300 | 1,300 | 1,300 | 767 | 1,311 | 1,350 | 1,350 |
| Rumania | 37 | 56 | 70 | 70 | 659 | 545 | 512 | 485 | 24,392 | 30,544 | 35,870 | 34,000 |
| U.S.S.R. | 181 | 192 | 192 | 192 | 1,070 | 865 | 865 | 865 | 194,000 | 166,000 | 166,000 | 166,000 |
| ASIA: | | | | | | | | | | | | |
| Iran | | | | | | | | | | | | |
| Cigarette | 15 | 28 | 58 | 48 | 700 | 615 | 553 | 1,338 | 10,400 | 17,500 | 32,562 | 25,794 |
| Iraq | - | - | - | - | - | - | - | - | - | - | - | 7,055 |
| Lebanon | | | | | | | | | | | | |
| Shak al Bent | 2 | 3 | 4 | 4 | 390 | 400 | 300 | 300 | 780 | 1,225 | 1,247 | 1,250 |
| Latakia 7/ | 2 | 2 | 2 | 2 | 785 | 1,100 | 1,200 | 1,200 | 1,570 | 2,300 | 2,487 | 2,510 |
| Syria | | | | | | | | | | | | |
| Latakia (Abu Riha) | 5 | 7 | 5 | 6 | 875 | 875 | 531 | 543 | 4,300 | 6,100 | 2,756 | 3,086 |
| Shak al Bent | 5 | 8 | 6 | 11 | 620 | 580 | 755 | 706 | 3,100 | 4,590 | 4,850 | 7,496 |
| Hasan Kayf | 3/ | 3/ | 3/ | 3/ | - | - | - | - | 30 | 20 | 31 | 66 |
| Turkey | 193 | 303 | 399 | 399 | 663 | 639 | 622 | 650 | 128,119 | 193,749 | 248,271 | 220,800 |
| Total | - | - | - | - | - | - | - | - | 643,321 | 708,036 | 780,025 | 755,405 |

1/ Preliminary. 2/ Not available. 3/ Less than 500 acres. 4/ Includes some sun-cured. 5/ Includes some sun-cured that is partially fire-cured. 6/ Less than a 5-year average. 7/ Latakia-fire-cured.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

3

# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

LIBRARY
CURRENT SERIAL RECORD
SEP 20 1954
U.S. DEPARTMENT OF AGRICULTURE

FT 34-54

August 31, 1954

## UNITED STATES EXPORTS AND IMPORTS OF UNMANUFACTURED TOBACCO, JANUARY-JUNE 1954, WITH COMPARISONS.

Total exports of unmanufactured tobacco for the first six months of the current year reflect a 28 percent decrease below exports for the same period in 1953.

Exports of Burley, Maryland, Virginia Sun-cured, Black Fat and Trimmings, Stems and Scrap show moderate increases. Exports of Flue-cured, Green River, One Sucker, Cigar Wrapper, and Cigar Binder reflect substantial decreases.

Exports of flue-cured tobacco at 115.6 million pounds were off 35 percent compared with the same period a year ago. This can be accounted for in large measure by decreased shipments to the United Kingdom. (15.2 million pounds for the first six months of 1954 compared with 66.6 million pounds for 1953). In the first six months of 1953, considerable quantities of tobacco, which normally would have moved to the United Kingdom in the fall of 1952, were exported under the provisions of an option purchase arrangement.

### Flue-Cured

Exports of flue-cured tobacco were 115.6 million pounds for January-June 1954 compared with 177.2 million pounds for the same period in 1953, a 35 percent decrease. The largest decrease is reflected in greatly reduced takings by the United Kingdom, the reason for which has already been explained. Other countries taking less flue-cured tobacco include West Germany, Portugal, Italy, Thailand, Hong Kong, Japan, and Australia. Yugoslavia showed a very substantial decrease, 182,000 pounds for January-June 1954 compared with 2.2 million pounds for the same period in 1953. There were increased takings by Uruguay, Norway, Denmark, Ireland, Finland, Spain, Indonesia, New Zealand, and Egypt.

### Burley

Exports of Burley increased in the first six months of 1954 over the same period in 1953. Mexico, the Netherlands, West Germany, Finland, Portugal, and Italy took more than in the same period a year ago. The sharpest declines were in exports to Austria, Switzerland and to France, which took no Burley for the period compared with 707,000 pounds in January-June 1953.

## Dark-Fired Kentucky-Tennessee

Exports of dark-fired Kentucky-Tennessee declined in the first six months of 1954. There were no exports of Kentucky-Tennessee to Spain for that period compared with 1.9 million pounds for the 1953 period. There were decreases in exports to Ireland, the Netherlands, Italy, and French West Africa. Increases were noted in the case of Denmark, the United Kingdom, France, New Zealand, Algeria, and Cameroon.

## Virginia Fire-Cured and Sun-Cured

Exports of Virginia fire-cured tobacco decreased slightly with the United Kingdom, West Germany, and Australia taking less in 1954 than in 1953. Austria has taken no Virginia fire-cured for 1954 compared with 97,000 pounds in 1953. Exports of Virginia sun-cured tobacco during January-June 1954, totaling 28,000 pounds, went to Norway and Honduras. Exports during January-June 1953, totaling 8,000 pounds, went to Switzerland and Algeria.

## Maryland

Exports of Maryland tobacco increased in the first six months of this year over January-June 1953. The sharpest increase was in exports to Yugoslavia, totaling 589,000 pounds in 1954 compared with 246,000 pounds in 1953. There were also increased takings by West Germany, Spain, and Tunisia. There were decreases in exports to the Netherlands and to Switzerland, which is the largest foreign user of Maryland tobacco.

## Green River, One Sucker

Exports of Green River and One Sucker tobacco decreased substantially in the first six months of this year compared with the same period in 1953. The sharpest decrease in exports of Green River tobacco was in the case of the United Kingdom (678,000 pounds in 1954 compared with 1.0 million pounds in 1953). There were decreases in exports of One Sucker tobacco during January-June 1954 to Belgium and Luxembourg and Nigeria. There were no exports of One Sucker tobacco in 1954 to the Netherlands and Yugoslavia compared with moderate takings by these countries for the same period in 1953.

## Black Fat

Exports of Black Fat tobacco increased in the first six months of 1954. The sharpest increase was reflected in takings by Nigeria (1.1 million pounds in 1954 compared with 725,000 pounds in 1953). There were decreases in exports to the Gold Coast and Western Portuguese Africa.

## Cigar Leaf

Exports of all cigar leaf declined substantially during January-June 1954 over the same period in 1953. There were no exports of cigar wrapper and cigar binder to East Germany during 1954 compared with exports totaling 1.3 million pounds in the first six months of 1953. There were decreases in cigar wrapper exports to Canada, Brazil, Denmark, the Netherlands, and West Germany. The sharpest decrease in exports of cigar binder is reflected in the East Germany figure mentioned above. Other countries taking less binder include Denmark, the Netherlands and Belgium and Luxembourg. There were increased takings by Canada, Sweden, and West Germany. Exports of cigar filler for January-June 1954 decreased slightly from the 1953 level. Algeria took no cigar filler in 1954 compared with 85,000 pounds in 1953. Indochina took 110,000 pounds in 1954 and none for January-June 1953.

## Perique, Trimmings, Stems and Scrap

Exports of Perique were practically the same for 1953 and 1954, while exports of Trimmings, Stems and Scrap increased very slightly for the first six months of 1954. Tangier took only 97,000 pounds in 1954 compared with 523,000 in 1953.

UNITED STATES: Exports of unmanufactured tobacco from the United States by types, January-June 1954 with comparisons

| Type | Calendar Years | | | January-June 1/ | | Jan.-June 1954 as Percent of Jan.-June 1953 |
|---|---|---|---|---|---|---|
| | Average 1947-51 | 1952 2/ | 1953 1/ | 1953 | 1954 | |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | Percent |
| Flue-cured | 388,078 | 319,270 | 444,306 | 177,197 | 115,585 | 65 |
| Burley | 32,865 | 26,871 | 25,007 | 12,450 | 16,662 | 134 |
| Ky.-Tenn. fire-cured | 24,591 | 21,752 | 19,485 | 10,964 | 9,669 | 88 |
| Virginia Fire-cured | 6,046 | 4,860 | 4,276 | 1,675 | 1,640 | 98 |
| Virginia Sun-cured 2/ | - | 277 | 42 | 8 | 28 | 350 |
| Maryland | 7,349 | 5,807 | 8,135 | 3,337 | 3,760 | 113 |
| Green River | 1,726 | 2,260 | 1,829 | 1,215 | 871 | 72 |
| One Sucker | 3,063 | 1,535 | 1,023 | 534 | 334 | 63 |
| Black Fat | 4,669 | 3,204 | 3,881 | 1,574 | 1,968 | 125 |
| Cigar Leaf: | | | | | | |
| Wrapper 2/ | - | 3,061 | 3,901 | 2,056 | 1,539 | 75 |
| Binder 2/ | - | 2,848 | 3,100 | 1,800 | 641 | 36 |
| Filler 2/ | - | 853 | 587 | 178 | 158 | 89 |
| Total Cigar Leaf | 9,770 | 6,762 | 7,588 | 4,034 | 2,338 | 58 |
| Perique | 79 | 60 | 66 | 38 | 36 | 95 |
| Trimmings, Stems & Scrap | 8,116 | 3,622 | 3,027 | 1,165 | 1,171 | 101 |
| Total | 486,352 | 396,280 | 518,665 | 214,191 | 154,062 | 72 |

1/ Preliminary.
2/ Class established January 1952.

Compiled in the Foreign Agricultural Service from official records of the Bureau of the Census.

## UNITED STATES: Exports of unmanufactured tobacco by type and principal countries of destination, January-June 1953-1954

FLUE-CURED

| Country | January-June 1953 | January-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| Mexico | 824 | 902 |
| El Salvador | 300 | 300 |
| Uruguay | 577 | 977 |
| Norway | 1,856 | 2,128 |
| Denmark | 1,716 | 2,239 |
| United Kingdom | 66,553 | 15,220 |
| Ireland | 2,003 | 2,695 |
| Netherlands | 14,000 | 13,275 |
| Belgium & Luxembourg | 2,687 | 2,425 |
| France | 25 | - |
| West Germany | 27,069 | 21,034 |
| Austria | 1,349 | 1,106 |
| Switzerland | 1,362 | 1,322 |
| Finland | 691 | 4,651 |
| Spain | 266 | 736 |
| Portugal | 2,804 | 2,058 |
| Malta | 610 | 352 |
| Italy | 4,399 | 1,011 |
| Yugoslavia | 2,248 | 182 |
| India | 576 | 437 |
| Pakistan | 916 | 1,035 |
| Ceylon | 561 | 380 |
| Thailand | 3,502 | 2,355 |
| Indochina | 989 | 947 |
| Indonesia | 5,485 | 6,844 |
| Philippines | 11,077 | 10,918 |
| Hong Kong | 2,247 | 1,360 |
| Taiwan | 527 | 549 |
| Japan | 5,859 | 4,763 |
| Australia | 5,607 | 4,010 |
| New Zealand | 3,227 | 3,972 |
| Egypt | 2,046 | 2,713 |
| Nigeria | 591 | 270 |
| British East Africa | 307 | 148 |
| Other | 2,341 | 2,271 |
| Total | 177,197 | 115,585 |

BURLEY

| Country | January-June 1953 | January-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| Mexico | 380 | 2,360 |
| Norway | 277 | 170 |
| Denmark | 239 | 115 |
| Netherlands | 288 | 1,136 |
| Belgium and Luxembourg | 1,357 | 1,237 |
| France | 707 | - |
| West Germany | 2,135 | 2,586 |
| Austria | 850 | 365 |
| Switzerland | 852 | 424 |
| Finland | 173 | 554 |
| Portugal | 2,094 | 2,462 |
| Italy | 540 | 2,333 |
| Philippines | 637 | 609 |
| Hong Kong | 114 | 257 |
| Australia | 13 | 59 |
| Egypt | 503 | 455 |
| Other | 1,291 | 1,540 |
| Total | 12,450 | 16,662 |

DARK-FIRED KENTUCKY-TENNESSEE

| Country | January-June 1953 | January-June 1954 |
|---|---|---|
| Peru | - | 110 |
| Iceland | - | 68 |
| Sweden | - | 108 |
| Denmark | 327 | 466 |
| United Kingdom | 295 | 411 |
| Ireland | 508 | 268 |
| Netherlands | 1,831 | 1,442 |
| Belgium and Luxembourg | 145 | 281 |
| France | 1,720 | 2,794 |
| West Germany | 298 | 259 |
| Switzerland | 873 | 929 |
| Azores | 50 | 22 |
| Spain | 1,851 | - |
| Portugal | 84 | 86 |

-Continued-

## UNITED STATES: Exports of unmanufactured tobacco by type and principal countries of destination, January-June 1953-54 (Continued)

| DARK-FIRED KENTUCKY-TENNESSEE | January-June | |
|---|---|---|
| Country | 1953 | 1954 |
| | 1,000 pounds | 1,000 pounds |
| Italy | 623 | 419 |
| Indochina | 6 | 51 |
| Indonesia | 376 | 330 |
| New Zealand | 84 | 115 |
| Algeria | 48 | 116 |
| Cameroon | 80 | 118 |
| French West Africa | 324 | 256 |
| Gold Coast | 148 | 135 |
| Egypt | 72 | 61 |
| Other | 1,221 | 824 |
| Total | 10,964 | 9,669 |

| VIRGINIA FIRE-CURED | | |
|---|---|---|
| Trinidad & Tobago | 109 | - |
| Sweden | 92 | 233 |
| Norway | 598 | 636 |
| United Kingdom | 279 | 53 |
| Ireland | 34 | 56 |
| Netherlands | 72 | 235 |
| West Germany | 85 | 57 |
| Austria | 97 | - |
| Switzerland | 117 | 119 |
| Australia | 155 | 107 |
| New Zealand | 15 | 81 |
| Other | 22 | 63 |
| Total | 1,675 | 1,640 |

| GREEN RIVER | | |
|---|---|---|
| United Kingdom | 1,022 | 678 |
| Netherlands | 151 | 30 |
| Belgium & Luxembourg | - | 118 |
| Liberia | 25 | 30 |
| Other | 17 | 15 |
| Total | 1,215 | 871 |

| VIRGINIA SUN-CURED | January-June | |
|---|---|---|
| Country | 1953 | 1954 |
| | 1,000 pounds | 1,000 pounds |
| Honduras | - | 1 |
| Norway | - | 27 |
| Switzerland | 6 | - |
| Algeria | 2 | - |
| Other | - | - |
| Total | 8 | 28 |

| MARYLAND | | |
|---|---|---|
| Denmark | 17 | 22 |
| Netherlands | 159 | 58 |
| Belgium and Luxembourg | 153 | 168 |
| West Germany | 114 | 341 |
| Switzerland | 2,203 | 2,189 |
| Spain | 119 | 145 |
| Yugoslavia | 246 | 589 |
| French Morocco | 202 | 111 |
| Tunisia | - | 93 |
| Other | 124 | 44 |
| Total | 3,337 | 3,760 |

| PERIQUE | | |
|---|---|---|
| Norway | 10 | - |
| United Kingdom | 24 | 33 |
| Other | 4 | 3 |
| Total | 38 | 36 |

| TRIMMINGS, STEMS, AND SCRAP | | |
|---|---|---|
| Sweden | 151 | 225 |
| Norway | 131 | 108 |
| Denmark | 39 | 68 |
| Netherlands | 19 | 188 |
| West Germany | 98 | 54 |
| Jordan | 23 | 78 |
| French Morocco | - | 204 |
| Tangier | 523 | 97 |
| Canary Islands | 70 | 14 |
| other | 111 | 135 |
| Total | 1,165 | 1,171 |

## UNITED STATES: Exports of unmanufactured tobacco by type and principal countries of destination, January-June 1953-54 (Continued)

| Country | January-June 1953 | January-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| **ONE SUCKER** | | |
| Trinidad & Tobago | 14 | 13 |
| Netherlands | 16 | - |
| Belgium & Luxembourg | 104 | 78 |
| Yugoslavia | 55 | - |
| Canary Islands | - | 26 |
| Nigeria | 315 | 180 |
| Other | 30 | 37 |
| Total | 534 | 334 |
| **BLACK FAT** | | |
| Bahamas | 19 | 11 |
| Netherlands Antilles | 21 | 17 |
| Canary Islands | 18 | 47 |
| Cameroon | 17 | 44 |
| French West Africa | 226 | 290 |
| Gold Coast | 469 | 389 |
| Nigeria | 725 | 1,122 |
| Western Portuguese Africa | 68 | 18 |
| Other | 11 | 30 |
| Total | 1,574 | 1,968 |
| **TOTAL CIGAR LEAF** | | |
| Canada | 305 | 215 |
| Brazil | 65 | 19 |
| Sweden | 1 | 53 |
| Denmark | 126 | 60 |
| Netherlands | 270 | 185 |
| Belgium & Luxembourg | 384 | 299 |
| West Germany | 1,316 | 1,100 |
| East Germany | 1,305 | - |
| Gibraltar | 38 | 8 |
| Indochina | - | 110 |
| Australia | 3 | 25 |
| Algeria | 85 | - |
| Canary Islands | 20 | 35 |
| Other | 116 | 229 |
| Total | 4,034 | 2,338 |

| Country | January-June 1953 | January-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| **CIGAR BINDER** | | |
| Canada | 12 | 72 |
| Sweden | 1 | 53 |
| Denmark | 34 | 8 |
| Netherlands | 146 | 60 |
| Belgium and Luxembourg | 200 | 100 |
| West Germany | 218 | 298 |
| East Germany | 1,162 | - |
| Australia | 3 | 25 |
| Other | 24 | 25 |
| Total | 1,800 | 641 |
| **CIGAR FILLER** | | |
| Canada | 47 | - |
| Netherlands | - | 31 |
| Gibraltar | 38 | 8 |
| Indochina | - | 110 |
| Algeria | 85 | - |
| Other | 8 | 9 |
| Total | 178 | 158 |
| **CIGAR WRAPPER** | | |
| Canada | 246 | 143 |
| Brazil | 65 | 19 |
| Denmark | 92 | 52 |
| Netherlands | 124 | 94 |
| Belgium and Luxembourg | 184 | 199 |
| West Germany | 1,098 | 802 |
| East Germany | 143 | - |
| Canary Islands | 20 | 35 |
| Other | 84 | 195 |
| Total | 2,056 | 1,539 |

## Imports of Unmanufactured Tobacco

Total imports of unmanufactured tobacco for the first six months of 1954 were slightly below imports for the same period in 1953 (52.5 million pounds for 1954 compared with 52.6 million pounds for 1953).

### Cigarette Leaf

Imports of cigarette leaf during January-June 1954 were slightly larger than those for the corresponding period a year ago — 39.0 million compared with 38.5 million pounds. Turkey, as usual, was the largest supplier this year, furnishing 27.4 million pounds. Greece supplied 7.6 million this year, up slightly from January-June 1953. Increases also occurred in imports from Yugoslavia and Italy. Imports from Syria, at 1.6 million pounds, were a little below those of a year ago.

### Cigar Leaf (filler)

Imports of cigar leaf (filler) decreased in the first six months of 1954 over the same period in 1953 by 787,000 pounds. Cuba, the largest importer, decreased from 7.4 million pounds in 1953 to 6.8 million pounds in 1954.

### Cigar Leaf (wrapper)

Imports of cigar leaf (wrapper) show a very moderate increase for January-June 1954 over the same period in 1953 (436,000 pounds in 1954 compared with 413,000 pounds in 1953). Imports from Cuba increased slightly from 198,000 pounds in 1953 to 241,000 pounds in 1954. Imports from Indonesia decreased from 215,000 pounds in 1953 to 194,000 pounds in 1954.

### Stems and Scraps

Total imports of stems and scraps increased for the first six months of 1954 (6.4 million pounds compared with 6.1 million pounds in 1953). Increases were reflected in imports from Cuba and the United Kingdom. There was a substantial decrease in imports from the Philippines.

### UNITED STATES: Imports of unmanufactured tobacco by principal countries of origin January-June 1953-1954 with comparisons

| Type and Country of Origin | Average: 1935-39 | Average: 1947-51 | 1952 1/ | 1953 1/ | January-June 1/ 1953 | January-June 1/ 1954 |
|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| **Cigarette Leaf:** | | | | | | |
| Turkey | 20,595 | 46,848 | 54,954 | 56,884 | 27,947 | 27,441 |
| Greece | 19,119 | 9,327 | 14,541 | 14,318 | 7,420 | 7,618 |
| Italy | 2,981 | 237 | 810 | 1,210 | 338 | 837 |
| Syria | 802 | 3,838 | 3,897 | 3,294 | 1,722 | 1,581 |
| Bulgaria | 1,164 | 2,165 | 7 | - | - | 33 |
| Soviet Union | 368 | 2,783 | 2/ | - | - | - |
| Southern Rhodesia | - | 1,154 | 561 | 259 | 71 | 81 |
| Other Countries | 1,604 | 826 | 1,148 | 2,009 | 1,034 | 1,413 |
| Total | 46,633 | 67,178 | 75,918 | 77,974 | 38,532 | 39,004 |
| **Cigar Leaf: (filler stemmed & unstemmed)** | | | | | | |
| Cuba | 11,111 | 16,477 | 13,874 | 14,172 | 7,361 | 6,751 |
| Philippines | 6 | 279 | 2,093 | 532 | 177 | 3 |
| Other Countries | 20 | 11 | 21 | 30 | 6 | 3 |
| Total | 11,137 | 16,767 | 15,988 | 14,734 | 7,544 | 6,757 |
| **Cigar Leaf:** (wrapper) | | | | | | |
| Cuba | 168 | 285 | 371 | 420 | 198 | 241 |
| Indonesia 3/ | 1,927 | 804 | 758 | 445 | 215 | 194 |
| Other Countries | 3 | 21 | - | 100 | - | 1 |
| Total | 2,098 | 1,110 | 1,129 | 965 | 413 | 346 |
| **Stems and Scraps:** | | | | | | |
| Cuba | 2,996 | 5,312 | 8,129 | 8,969 | 4,651 | 5,198 |
| Philippines | 5,686 | 309 | 1,219 | 2,303 | 1,239 | 851 |
| United Kingdom | 1,663 | 105 | 417 | 465 | 241 | 294 |
| Other Countries | 1,060 | 687 | 58 | 19 | 2 | 9 |
| Total | 11,405 | 6,413 | 9,823 | 11,756 | 6,133 | 6,352 |
| Total Imports | 71,273 | 91,468 | 102,858 | 105,429 | 52,622 | 52,549 |

1/ Preliminary.
2/ Less than 500 pounds.
3/ Includes Indonesian tobacco reshipped from the Netherlands.

Compiled in the Foreign Agricultural Service from official records of the Bureau of the Census.

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FT 35-54 August 31, 1954

# TOBACCO PRODUCTION AND TRADE OF THE BELGIAN CONGO AND RUANDA-URUNDI (Protectorate of Belgian Congo) 1/

By James W. Birkhead

## Summary

The Belgian Congo tobacco industry is of interest to the United States chiefly as an importer of leaf tobacco and cigarettes; also, there is interest in the possible future level of domestic production of leaf tobacco.

Consumption of tobacco products is increasing rapidly. The manufacture of tobacco products is likely to increase rapidly in the next few years. Production of leaf tobacco is small but is expanding and this trend is likely to continue. However, in the period immediately ahead, most of the leaf used domestically will continue to be imported. Although the imports of tobacco products will probably continue, the level is likely to decline sharply as domestic production expands.

## Introduction

The combined area of the Belgian Congo and Ruanda-Urundi is 904,800 square miles or over 17 times the size of North Carolina. It is very sparsely populated. In 1951, there was a total population of 15.2 million of which only 61,700 were non-natives. Although the incomes of natives are low, they probably will rise considerably in the next few years as the country has many resources which are being developed rapidly.

## Production

No estimates of the production of leaf tobacco are made by the Belgian Congo Department of Agriculture. In 1953, most of the tobacco produced was unimproved dark air-cured. The bulk of this was produced in the Northeast corner of the Belgian Congo in the Bugoye area, which is located near the Gomia-Kisenye region, part of which is in the Belgian Congo Protectorate of Ruanda-Urundi. In this area some of the tobacco is produced under a Government control and improvement scheme, but most of it is not "controlled." There were approximately

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1/ The author has recently returned from a trip through Africa and Brazil, where he studied tobacco production and trade. This is one of a series of reports, which also includes Southern Rhodesia, Northern Rhodesia, Nyasaland, British East Africa, Madagascar, Union of South Africa, Mozambique and Brazil.

10,000 non-controlled growers, who produced 12,500 acres and 1,100,000 pounds of dark tobacco in this area in 1953. There were 240 controlled producers, who produced 120 acres and approximately 93,500 pounds of dark air-cured leaf. This tobacco is Nicotiana Rustica, which is very heavy and dark with a high nicotine content. It is also very heavily diseased. Most of it is used by the natives and is not sold through regular stores. Considerable amounts are used for pipe tobacco, cigar leaf, and snuff. Cigars of a very black, strong type are manufactured from this leaf and sold in regular stores. The Government participates in an effort to stimulate and improve production in this area.

In 1953, in the northeastern corner of the Belgian Congo from Aru to Aba, several thousand pounds of improved dark air-cured leaf of the Western (Canadian) variety was grown. A private tobacco company handles the seedbeds and issues seedlings to the natives (Niolotic-Bantu) in this area. The company issuing the seedlings also purchases all of the production.

Some flue-cured and dark air-cured leaf are produced in the southwest part of the Congo around Kabaliku, which is near Luisa and close to the Angolan border. In this area about 170,000 pounds of flue-cured and dark air-cured are produced by natives working under European supervision.

The Belgian Congo Government under some sort of scheme produces dark air-cured tobacco at Kasenga in the Katanga province, located in the southeastern corner of the Belgian Congo near Elizabethville. The natives produced approximately 265,000 pounds of this kind of leaf in the Katanga area in 1953.

In summary, production of leaf tobacco is small, but expanding with prospects for a continued rise in output.

Belgian Congo: Production of unmanufactured tobacco, 1940-53

| Year | European Plantations | Natives | Total |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1940 | 12 | 1/ | 1/ |
| 1941 | 16 | 1/ | 1/ |
| 1942 | 82 | 1/ | 1/ |
| 1943 | 47 | 1/ | 1/ |
| 1944 | 98 | 1/ | 1/ |
| 1945 | 110 | 1/ | 1/ |
| 1946 | 55 | 1,600 | 1,655 |
| 1947 | 140 | 1,320 | 1,460 |
| 1948 | 240 | 1,500 | 1,740 |
| 1949 | 205 | 2/1,500 | 1,705 |
| 1950 | 2/ 240 | 2/1,500 | 2/1,740 |
| 1951 | 2/ 275 | 2/1,500 | 2/1,775 |
| 1952 | 2/ 310 | 2/1,500 | 2/1,810 |
| 1953 | 350 | 1,600 | 1,950 |

1/ Not available.
2/ Estimated.
Source: Reports from Foreign Service Officers and Estimates of Representatives of the Tobacco Manufacturing Industry Leopoldville.

## Imports of Tobacco Products

Relatively large quantities of tobacco products, mostly cigarettes, are imported. Imports rose to a peak of 6.5 million pounds in 1951, but have declined to 4.6 million pounds in 1953. More than two-thirds of all imports are from the United Kingdom. Other important suppliers include the United States, Southern Rhodesia, and Belgium. In the past, large quantities of cigarettes have been imported from Uganda, but shipments from this area are reported to have virtually terminated in 1953. Significant quantities of cigars are taken from the Netherlands and Belgium. Belgium, the United States, and United Kingdom supply the bulk of the smoking tobacco imported.

Imports of manufactured products are likely to decline as domestic production expands. Even if total imports do decline, the United States probably could supply a larger share of these imports. Dollars are readily available.

## Imports of Unmanufactured Tobacco

Imports of unmanufactured tobacco have increased rapidly as domestic manufacturing facilities rose after World War II. The takings of foreign tobaccos rose from 1.1 million pounds in 1946 to 7.7 million in 1953. Imports of unmanufactured leaf in 1953 were valued at 88.6 million francs (equivalent to about $4.5 million U. S.). Nyasaland, Southern Rhodesia, Union of South Africa, and the United States in that order were the most important suppliers. Although, normally, Italy does not export leaf to this area, there were small takings from Italy in 1951 and 1952 and the level of takings from that country rose sharply to 645,700 pounds in 1953. Also, shipments consigned from Belgium have been increasing.

Consumption of tobacco products is increasing and imports of leaf are likely to expand even though efforts are being made to increase the domestic production of leaf. There is no dollar problem and high quality leaf with aroma and flavor is needed to blend with the neutral tobaccos purchased from Central and Southern Africa. The United States should be able to compete successfully in furnishing a higher proportion of the leaf purchased by the Belgian Congo, although part of the leaf presently imported from other areas of Africa is relatively low in both quality and price.

## Import Duties

The import tariff is 50 percent of the value on unmanufactured tobacco and 80 percent of the value on manufactured tobacco products.

Belgian Congo and Ruanda-Urundi: Imports of tobacco products by country of origin, 1946-52 1/

| Commodity and Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 4/ 1952 | 1953 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Cigarettes | | | | | | | | |
| United Kingdom | 1,392 | 795 | 3,074 | 4,095 | 3,612 | 5,090 | 3,645 | 3,853 |
| Brit.East Africa | 1,119 | 819 | 1,093 | 640 | 825 | 625 | 664 | 2/ |
| United States | 603 | 469 | 609 | 490 | 643 | 484 | 694 | 469 |
| Southern Rhodesia | 269 | 257 | 200 | 213 | 184 | 178 | 109 | 112 |
| Belgium | 892 | 265 | 79 | 54 | 89 | 105 | 128 | 164 |
| U. of South Africa | 64 | 49 | 117 | 53 | 9 | 2/ | - | 12 |
| Other Countries | 35 | 4 | 20 | 1 | 4 | 9 | 2 | 5 |
| Total | 4,374 | 2,658 | 5,192 | 5,546 | 5,366 | 6,491 | 5,242 | 4,615 |
| Cigars and Cigarillos | | | | | | | | |
| Netherlands | 5 | 3 | 12 | 8 | 12 | 14 | 16 | 18 |
| Belgium | 3 | 4 | 15 | 4 | 12 | 10 | 12 | 16 |
| United States | 2/ | 2/ | 35 | 2/ | 2/ | 9 | 1 | 2/ |
| Other Countries | 1 | 3/ 10 | 305 | 1 | 1 | 1/ | 1 | 2 |
| Total | 9 | 17 | 367 | 13 | 25 | 33 | 30 | 36 |
| Other Manufactured Tobacco | | | | | | | | |
| Belgium | 15 | 13 | 17 | 20 | 16 | 19 | 16 | 15 |
| United States | - | 2 | 2 | 4 | 3 | 3 | 4 | 4 |
| United Kingdom | 5 | 1 | 2 | 3 | 3 | 2 | 2 | 2 |
| Other Countries | 4 | 1 | 1 | 1 | 2 | 1 | 1 | 2 |
| Total | 24 | 17 | 22 | 28 | 24 | 25 | 23 | 23 |
| Total Imports of Tobacco Products | 4,407 | 2,692 | 5,581 | 5,587 | 5,417 | 6,549 | 5,295 | 4,674 |

---

1/ Gross weight used except for 1946 and 1947, which is reported in net weight only.

2/ Less than 500.

3/ Principally Southern Rhodesia.

4/ Data available for July to December only. Total for the year was estimated by multiplying the data for the six-month period by two.

Source: Commerce Exterieur and Monthly Statistical Bulletins of the Congo Belge and Ruanda-Urundi.

Belgian Congo and Ruanda-Urundi: Imports of unmanufactured tobacco by country of origin, 1946-53 1/

| Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Nyasaland | - | 590.7 | 1,200.0 | 1,185.9 | 1,495.3 | 4,418.9 | 2,686.5 | 2,608.0 |
| So. Rhodesia | 3/192.9 | 3/243.1 | 244.5 | 340.1 | 715.6 | 1,187.0 | 1,159.8 | 1,788.6 |
| U. of So. Africa | 19.0 | 355.9 | 80.2 | 2,978.4 | 1,843.2 | 257.6 | 281.0 | 1,184.3 |
| United States | 23.5 | 119.3 | 2/ | 86.6 | 183.5 | 128.4 | 786.5 | 893.0 |
| Belgium | 2/ | 5.8 | 3.1 | 63.6 | 44.4 | 51.5 | 418.4 | 212.2 |
| Italy | - | - | - | - | - | 148.7 | 41.8 | 645.7 |
| Brit. E. Africa | 689.7 | - | 4.0 | 11.0 | 20.9 | 44.6 | 93.2 | 100.0 |
| Turkey | - | - | 22.0 | 22.1 | 19.9 | 25.6 | 40.8 | 56.9 |
| Angola | 2.1 | 0.8 | 1.5 | 1.0 | 2.8 | 0.4 | 2.2 | 1.8 |
| Fr. Equatorial Africa | 0.7 | 0.3 | 1.7 | 0.7 | 0.1 | 0.5 | 0.1 | 2.7 |
| No. Rhodesia | - | - | 29.7 | 129.1 | 19.3 | 41.0 | - | - |
| Other Countries | 133.7 | 87.0 | 112.7 | 180.6 | 3.5 | 0.3 | 8.7 | 4/193.2 |
| Total | 1,061.6 | 1,402.9 | 1,699.4 | 4,999.1 | 4,348.5 | 6,304.5 | 5,519.0 | 7,686.4 |

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1/ Gross weight used except for 1946 and 1947, which is reported in net weight only.

2/ Less than 75 pounds.

3/ Reported as from "Rhodesia."

4/ Principally from United Kingdom.

Source: Commerce Exterieur and Monthly Statistical Bulletins of the Congo Belge and Ruanda-Urundi.

Belgian Congo and Ruanda-Urundi: Exports of manufactured tobacco by country of destination, 1946-53 1/

| Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Belgium | 120 | 3 | 7 | 2/ | 1 | 2/ | 2/ | 2/ |
| Angola | 1 | 3 | 9 | 12 | 14 | 18 | 15 | 10 |
| Fr. Equatorial Africa | 42 | 9 | 2/ | - | 2/ | 2 | 2 | 2/ |
| Brit. East Africa | - | - | - | - | - | 1 | 25 | 22 |
| Other Countries | 24 | 2 | 2/ | 1 | 2/ | 2/ | 2/ | 1 |
| Total | 187 | 17 | 16 | 13 | 15 | 21 | 42 | 33 |

---

1/ Gross weight used except for 1946 and 1947 which is reported in net weight only.

2/ Less than 500.

Source: Commerce Exterieur and Monthly Statistical Bulletins of the Congo Belge et Ruanda-Urundi.

## Exports of Unmanufactured Tobacco

Exports of unmanufactured leaf are small with no shipments in four years during the 1946-53 period. All of the shipments reported were to Belgium. Exports of leaf in 1953 were valued at 7.4 million francs (equivalent to about $250,000 U. S. currency).

Belgian Congo and Ruanda-Urundi: Exports of leaf tobacco by country of destination, 1946-53 1/

| Country | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | | | |
| Belgium | 127 | 225 | - | - | - | - | 252 | 183 |

1/ Gross weight used except for 1946 and 1947, which is reported in net weight only

Source: Commerce Exterieur and Monthly Statistical Bulletins of the Congo Belge and Ruanda-Urundi.

## Exports of Manufactured Tobacco Products

The exports of manufactured products are relatively unimportant with only 33,000 pounds shipped to foreign areas in 1953. Most of the foreign sales in the last two years have been to British East Africa and Angola.

## Manufacturing

There were two modern tobacco manufacturing companies in operation in 1954 and capital had been raised for construction of another factory by a newly organized company. There is another company or "society," reportedly organized chiefly by religious leaders, which processes the dark tobacco produced by natives in the Ruanda-Urundi area near Uganda.

Domestic production, especially of cigarettes, is likely to increase rapidly in the next few years.

After imported leaf is unloaded at the seaports, there is often much delay in shipment from the ports to the factories. Some people in the tobacco industry prefer to import aged leaf as tobacco does not age properly in storage in the Belgian Congo.

Considerable difficulty and damage are caused by the tobacco beetle both to tobacco in storage as well as to the manufactured products. There are no adequate fumigation facilities in the Congo.

FOREIGN AGRICULTURE CIRCULAR

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WASHINGTON, D.C.

FT 36-54 September 24, 1954

# TOBACCO PRODUCTION AND TRADE OF THE FEDERATION OF RHODESIA AND NYASALAND (SOUTHERN RHODESIA, NORTHERN RHODESIA AND NYASALAND) 1/

By James W. Birkhead, Agricultural Economist

## Preface:

This is primarily a report on foreign competition in regard to the influences of present and potential production, prices, etc., in these areas on United States exports of tobacco. However, the objectives of this study are somewhat broader than those included in the usual circular designed primarily for the tobacco trade.

In addition to the usual aspects covered in studies of competition offered by other producing countries — current and potential production, quality, prices, export outlets, discriminatory trade agreements, preferential tariff duties, etc., — this report includes certain aspects of production which are of special interest to certain State Agricultural colleges, research agencies of the U. S. Department of Agriculture and other groups.

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Because of this, there was an attempt to include discussions of climate, analyses of factors likely to influence changes in quality, yields, and levels of production.

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1/ The author has recently returned from a trip through Africa and Brazil where he studied tobacco production and trade. This is one of a series of reports, which also includes studies of the Union of South Africa, British East Africa, Madagascar, Mozambique (Portuguese East Africa), Belgian Congo, and Brazil.

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## Summary and General Outlook for the Federation

The rise in tobacco production in these British territories has been stimulated over a long period of time, but especially in the acute dollar shortage period after World War II, chiefly in order to save dollars. Expansion of exports to the United Kingdom and Australia, the two largest takers of leaf from the area, has been accomplished partly through preferential import duties on leaf from this area as compared to the duties paid on leaf imported from the United States. Labor supplies and adapted soils are adequate for considerable further expansion. Production of flue-cured is likely to increase, but increasing quality and yields, as well as maintenance of appropriate prices in relation to the prices for competitive leaf, will be more important than in recent years.

Some of the favorable factors for achieving greater production are availability of adequate areas of adapted soils, an expanded and improved research program, ample labor supply, low wage rates, increased experience of producers, proof of the profits to be obtained from increased use of fertilizer, and preferential duties as well as five-year purchase agreements with the United Kingdom and Australia. Some of the unfavorable aspects include severe weather hazards, particularly in regard to distribution of rainfall, unpredictable response to fertilizer due to the type of rainfall, lack of educated and technically trained workers, inadequate number of experienced managers, prevalence of certain diseases, especially white mold and leaf spot, and the possible influence on export demand of rapidly increasing the proportion of such neutral tobacco in high-quality cigarettes consumed in certain importing countries, even though the proportion of such tobacco might be increased gradually over a period of time without too much consumer resistance.

What happens in connection with tobacco production in this area is of keen interest to United States farmers and the tobacco trade, as this is the number one competitor of the United States in regard to tobacco exports, especially to the United Kingdom and Australia. This area has been supplying an ever increasing proportion of the world trade in flue-cured and dark fire-cured leaf and this trend is likely to continue unless effective means can be found for offsetting the advantages presently enjoyed by tobacco producers in this area — preferential import duties in important markets, long-term purchase agreements, cheap labor, etc.

## Summary by Kind of Tobacco

### Flue-Cured

The crop harvested in the first half of this year in the Federation is estimated at about 125 million pounds, an all time high, - 112.5 million pounds in Southern Rhodesia, 8 million pounds in Northern Rhodesia, and 3.85 million pounds in Nyasaland. The Southern Rhodesian crop was not as good as expected earlier. This year's crops in Nyasaland and western area of Northern Rhodesia were perhaps as good or better than average in quality; while in the eastern area of Northern Rhodesia, the crop was below average in quality.

Yields per acre are low and on the average only a relatively small proportion of production is of good quality. Climate, particularly in the high elevation areas, to some extent limits improvement in yield and quality. Production is likely to continue to increase, but more emphasis will be on improving yields rather than expanding acreage, which was relied on in the past. Recent experimental data indicate that yields can be economically increased substantially through use of more fertilizer and improved practices.

With relatively larger supplies of low grade tobacco and improved dollar availability in several Western European countries, buyers who are purchasing for export to such areas are likely to give much more consideration to quality and price than they have in recent years. The future level of flue-cured production and exports from this area depend largely on improving quality and yields in addition to the maintenance of appropriate price levels.

### Dark Fire-Cured and Sun-Cured

In 1954 about 22.6 million pounds of dark fire-cured and 5.2 million pounds of dark sun-cured were harvested in the Federation. All of this output was from Nyasaland with the exception of 560,000 pounds of fire-cured grown in Southern Rhodesia. Labor supplies are ample and there are sufficient areas of adapted soils to substantially increase the production of dark fire-cured and sun-cured leaf, particularly in Nyasaland. The quality of leaf varies greatly from year to year, but generally quality and price are such that it is readily sold in world markets. Production of fire-cured may increase somewhat, but as demand for this kind of leaf is limited and the products in which it is used are declining in popularity, production in the next few years is not expected to change materially. Output of sun-cured is likely to expand in response to active demand for this kind of leaf.

### Turkish

It is estimated that 350,000 pounds of Turkish were harvested in the Federation this year, - 250,000 pounds in Southern Rhodesia and 100,000 pounds in Northern Rhodesia. There were experimental plantings in Nyasaland, as well as in new areas of Southern Rhodesia and Northern Rhodesia. This year's harvest is reportedly somewhat larger than that of last year, but well below output in the peak years of 1946, 1947, and 1948.

Samsoun, rather than the higher yielding Selouk variety, which has been grown in the past, is in demand by American companies.

Hand labor requirements are very high and at current prices Turkish cannot compete effectively with flue-cured on farms operated by Europeans. Many people interested in the expansion of Turkish think that efforts should be oriented to the Trustlands or native reserve areas, where labor supplies are more plentiful. This appears logical, but with the present returns from Turkish in comparison with returns from certain other crops, especially corn and peanuts, it would be very difficult to secure a large expansion in output of Turkish even from these areas.

Burley

About 1.95 million pounds of burley was estimated as harvested in the Federation this year, - 1,827,000 pounds in Nyasaland and 120,000 pounds in Northern Rhodesia. The leaf is much heavier and redder than U.S. burley. Production in Nyasaland is likely to expand, while that of Northern Rhodesia may remain fairly constant in the next few years. Some Department of Agriculture offices indicated that they thought output would rise in Northern Rhodesia during the next few years. Output is not expected to increase greatly in the near future.

| British Central Africa | 1935-39 | 1942-46 | 1947-51 | 1952 | 1953 | 1954 1/ |
|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Southern Rhodesia | | | | | | |
| Flue-cured | 24,623 | 40,043 | 82,145 | 98,969 | 105,148 | 112,500 |
| Fire-cured | 862 | 735 | 913 | 635 | 368 | 560 |
| Turkish | 665 | 3,137 | 1,445 | 159 | 150 | 250 |
| Northern Rhodesia | | | | | | |
| Flue-cured | 1,715 | 2,534 | 4,473 | 9,524 | 10,324 | 8,000 |
| Burley | 2/ | 65 | 205 | 124 | 120 | 105 |
| Turkish | 10 | 314 | 391 | 50 | 30 | 100 |
| Sun-Air 3/ | 45 | 15 | 74 | 28 | 20 | 2/ |
| Nyasaland | | | | | | |
| Dark Fire-cured | 12,149 | 16,547 | 20,976 | 15,484 | 23,838 | 21,966 |
| Dark Sun Air-cured 5/ | 1,335 | 5/3,415 | 3,929 | 2,944 | 6,270 | 5,190 |
| Flue-cured | 2,267 | 2,318 | 2,697 | 3,460 | 3,568 | 3,851 |
| Burley | 4/ | 4/ 847 | 1,025 | 998 | 1,673 | 1,827 |
| Federation | | | | | | |
| Flue-cured | 28,605 | 44,895 | 89,315 | 111,953 | 119,040 | 124,351 |
| Burley | - | 912 | 1,230 | 1,122 | 1,793 | 1,932 |
| Fire-cured | 13,011 | 17,282 | 21,889 | 16,119 | 24,206 | 22,526 |
| Sun-cured | 1,380 | 3,430 | 4,003 | 2,972 | 6,290 | 5,190 |
| Turkish | 675 | 3,451 | 1,836 | 209 | 180 | 350 |
| Grand Total | 43,671 | 69,970 | 118,273 | 132,375 | 151,509 | 154,349 |

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1/ Preliminary.
2/ Not available.
3/ Less than 5-year average.
4/ Figure for 1946 only.
5/ Burley was included in sun air-cured prior to 1946.

Tobacco in each area of the Federation (Southern Rhodesia, Northern Rhodesia and Nyasaland) is discussed separately below.

## SOUTHERN RHODESIA

### Introduction

The total area of Southern Rhodesia is 150,354 square miles, which is somewhat larger than the combined area of North Carolina, South Carolina, and Georgia, or about five times the size of Virginia. In 1953, there was a total population of 2,260,000, of which 2,090,000 were natives. Tobacco is produced only in a limited area of the plateau in the Northeastern part of Southern Rhodesia. Practically all of this area is more than 3,000 feet in elevation.

### Production By Kind of Tobacco

Flue-cured accounts for the bulk of production, but some fire-cured and Turkish are also grown.

The flue-cured crop harvested in 1954 is estimated at a record level of 112.5 million pounds or about 7 million pounds more than the amount harvested in 1953. The acreage was estimated at 172,500 acres, which is a decline from the 1951-52 and 1952-53 levels.

Turkish leaf harvested in 1954 is estimated at 250,000 pounds, a substantial increase over the crops harvested in 1952 and 1953.

The fire-cured harvested in 1954 is estimated at 625,000 pounds, considerably greater than the 1953 crop, but, with the exception of 1953, is the smallest output since the making of estimates by type were initiated in 1936.

Southern Rhodesia: Acreage and production of tobacco by kind, 1935-54

| Period 1/ | Flue-cured |  | Fire-cured |  | Turkish |  |
|---|---|---|---|---|---|---|
|  | Acreage | Production | Acreage | Production | Acreage | Production |
|  | 1,000 acres | 1,000 pounds | 1,000 acres | 1,000 pounds | 1,000 acres | 1,000 pounds |
| 1935-39 Av. | 46.0 | 24,623 | 1.6 | 862 | 1.8 | 665 |
| 1940-44 Av. | 64.2 | 35,183 | 1.3 | 727 | 4.0 | 1,609 |
| 1945 | 71.0 | 46,722 | 1.1 | 718 | 10.0 | 4,471 |
| 1946 | 74.4 | 46,641 | 1.0 | 587 | 10.6 | 4,859 |
| 1947 | 90.8 | 57,438 | 1.4 | 925 | 11.8 | 4,796 |
| 1948 | 112.6 | 74,680 | 1.3 | 837 | 4.6 | 1,687 |
| 1949 | 126.0 | 82,388 | 1.5 | 851 | 1.2 | 368 |
| 1950 | 152.7 | 105,492 | 1.8 | 1,241 | .8 | 276 |
| 1951 | 167.8 | 90,726 | 1.7 | 712 | .3 | 99 |
| 1952 | 189.2 | 98,969 | 1.3 | 635 | .5 | 159 |
| 1953 | 179.0 | 105,148 | .7 | 370 | .4 | 150 |
| 1954 2/ | 172.5 | 112,500 | 1.0 | 560 | .7 | 250 |

1/ Year of harvest.
2/ Preliminary.

## SOUTHERN RHODESIA

Southern Rhodesia: Average yield per acre by kind of tobacco - 1935-54

| Period | Flue-cured | Fire-cured | Turkish |
|---|---|---|---|
| | Pounds | Pounds | Pounds |
| 1935-39 Av. | 509 | 475 | 353 |
| 1940-44 Av. | 543 | 541 | 400 |
| 1945 | 657 | 676 | 453 |
| 1946 | 560 | 576 | 457 |
| 1947 | 633 | 668 | 406 |
| 1948 | 663 | 636 | 363 |
| 1949 | 654 | 558 | 319 |
| 1950 | 691 | 703 | 356 |
| 1951 | 541 | 419 | 304 |
| 1952 | 523 | 501 | 314 |
| 1953 | 587 | 529 | 350 |
| 1954 | 652 | 574 | - |

Each major type of tobacco, flue-cured, fire-cured, and Turkish, is discussed separately below.

### Flue-cured - Production

Seedbeds are established in August and are watered, usually by hand, until the seedlings are large enough to be transplanted, as there is practically no rain from April 1 until about October. Care must be taken to avoid introducing eelworms through the water used on the seedbeds or in transplanting.

The typical rainfall pattern in the most important flue-cured area of Southern Rhodesia is indicated below.

| Period | Inches |
|---|---|
| November | 4 |
| December | 7 |
| January | 8 |
| February | 7 |
| March | 4 |
| Remainder 1/ | 3 |
| Total | 33 |

1/ Mostly in April and October

The dates when the rains begin and terminate vary greatly from year to year, but they usually begin in October and terminate about the end of March. Transplanting frequently is "staggered" over a fairly long period beginning sometimes in October and extending into December. This is done in order to reduce the weather risk and spread the harvest over a long period. The harvest is a time of peak labor requirements and available barn space limits the amount that can be cured simultaneously. Frequently, the "Sumatran" or dry weather system of transplanting by hand watering is used early in the season, but even when water is added seedling mortality is high if it does not rain soon after the crop is transplanted. It is not unusual to replant several times, even during the rainy season. Farmers say that this is largely necessary because the job of transplanting is not done properly by the natives. Sometimes the plants are watered by hand at intervals after they have been transplanted.

Little fertilizer is now used, but its use is expanding rather rapidly. A great amount of research is being done on the most appropriate mixtures for use on each major soil type. Side dressing by hand is a fairly common practice. Compost is also used and is placed by hand around each plant after it is transplanted.

Both tractors and oxen are used for draft power in preparing land, cultivation and harvesting the crop. There are no horses or mules for draft work. The harvest period usually extends from mid-February until early April. The harvested leaves are taken to sheds, where they are tied on stocks. After the leaves are cured, they are removed from the curing barn and hung or placed in large bulks in the grading shed. When grading begins, the crop is brought into "order" or kept in condition by sprinkling the floor with water or through use of steam blowers. Frequently, grading sheds have cellars where the leaf is "conditioned." The grading sheds are equipped with hand-operated screw presses for baling the leaf after grading is completed.

## Typical Tobacco Farm

The average Rhodesian tobacco producer operates on a big scale as compared to U. S. tobacco farmers. In the 1953-54 season, 2,627 growers handled 172,500 acres of flue-cured or an average of 66 acres per farm.

The typical tobacco farm contains a total of about 2,400 acres, of which approximately one-third is arable land. Five hundred acres of the usual farm has been stumped or cleared of brush, and perhaps 300 acres of arable land is still under brush or trees. Four hundred acres is swamp or marsh land along streams, and about 1,200 acres is rocky ground, steep slopes, or land which otherwise presently cannot be cultivated. The typical tobacco farm has approximately 70 acres of tobacco, 70 acres of corn, and 70 acres of other crops, exclusive of pasture. Also, there is an average of about 100 head of cattle per farm.

## Major Costs of Producing Flue-Cured Leaf

The average cost of producing flue-cured leaf is estimated by tobacco specialists of the Southern Rhodesian Department of Agriculture at about $225 per acre. Most of the production costs reported by the various farmers ranged between $180 and $300 per acre, but $225 was fairly typical. These costs are based on average yields of approximately 600 pounds of leaf per acre. This average cost is equivalent to 37.5 U. S. cents per pound (based on a 600 pound yield, farm sales weight). On the basis of this cost and the average price of 46.3 U. S. cents received in 1953, the typical operator would have realized a net profit of about $51.50 per acre of tobacco, or a total of $3,420 from 66 acres of tobacco per farm. The average cost of production estimated by growers and Government tobacco specialists may be high. It should be pointed out that the usefulness of such cost information is rather limited. On many farms, in addition to working on tobacco and other crops, the natives dig wells, clear brush, drain land, construct buildings, etc., which increases production potential and long-term value of the farm: thus, the entire wages of such labor should not be charged to the cost of producing tobacco and other crops grown currently.

## SOUTHERN RHODESIA

To the cost and income from tobacco, one must add the costs and returns from other crop and livestock enterprises in order to make an overall farm appraisal of the relative attractiveness of tobacco farming as compared to alternatives.

Some of the more important cost items are labor, machinery and equipment, motor vehicles, fertilizer, fuel for curing, burlap and paper for wrapping bales, grading and warehouse handling charges.

The table below indicates the relative importance of some of the major cost items. The per acre cost of fertilizers has increased substantially since 1950-51, as larger amounts are now used, and the cost of curing rises as farmers shift to oil, which is more expensive than wood or coal.

TYPICAL PROPORTIONS OF TOBACCO FARMING
COST OF PRINCIPAL ITEMS OF EXPENSE 1/

| Expense Item | Percentage of Total Cost |
|---|---|
| Native Wages and Purchased Rations . . | 26-28 |
| (Native Wages only 17-19%) | |
| European Salaries and Bonuses . . . . . . | 8-28 |
| Initial Allowances and Depreciation . . | 9-10 |
| Motor Vehicles, Fuel and Running . . .. | 9-10 |
| (Motor Vehicles, fuel only 4-6%) | |
| Fertilizers . . . . . . . . . . . . . . . . | 5-7 |
| Tobacco Selling and Levy . . . . . . . .. | 4-8 |
| Repair and Renewals . . . . . . . . . .. | 2-4 |
| Hessian, Paper and Twine . . . . . . .. | 1-2 |
| Insurances . . . . . . . . . . . . . . . .. | 1-2 |
| Other Expenses . . . . . . . . . . . . .. | Balance |
| TOTAL . . . . . .. | 100% |

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1/ See "The Economics of Tobacco Farming" by Dr. William E. Haviland, now Associate Professor of Economics, McGill University in Canada, who made a comprehensive study of tobacco farms in Southern Rhodesia in 1952. "Rhodesian Tobacco," No.3, Dec.,1953.

In discussing costs, it is well to outline some of the major production items.

### Native Labor

The native labor supply on the typical tobacco farm described above would probably be about 35 adult males, of which about 20 would be married and 15 unmarried. The wives and larger children customarily help with the transplanting, harvesting, and grading. The native workers agree to work for a particular grower for the entire tobacco season (until grading is completed), but may leave during this period upon one month's notice by either party. About 90 percent of the labor remains on the farm the entire year. In the July-September period the workers may seek employment elsewhere, as this is a slack time on tobacco farms. Nyasaland is an important source of labor and those recruited from that area usually remain in Rhodesia for two or three years. New labor is recruited in the July-September period. The adult male native receives approximately $6.30 per month in cash. In addition to the $6.30 cash, each adult male native is supplied 56 pounds of corn meal, 8 pounds of meat, and perhaps about 8 pounds of beans or peanuts per month. The cash wage plus perquisites is equivalent to a total of about $11 to $11.50 per month. Many natives raise a few chickens or pigeons. The worker is furnished a hut, and frequently is allowed one-half to one acre of land on which to grow food crops, such as corn, sweet potatoes, peanuts, and munga (millet). Also, bananas, guava, and other fruit are usually available in season.

Young native males, as well as some females, between the ages of 9 and 16 (usually from the families on the farm) are employed throughout the season or during peak labor periods. They usually receive the same food allowance as adults, and are paid from $1.40 to $4.20 cash per 30 working days, depending on the age. If the adult female, who is the wife of a native laborer, works on tobacco, she receives from $4.20 to $5.60 per 30 working days without rations or extra rations, and somewhat less cash. Many producers do not permit a native "boss-boy"to allot work or supervise other native men. Frequently, he is allowed to assign and supervise only the children and female workers.

## Manager and Supervisory Personnel

The salary of a European manager is ordinarily around $2800 per year, which includes a bonus of about $1700. The larger farms may have an assistant manager or supervisor, who usually is European, and his salary is about $1400 per year, which includes a bonus of about $300. The manager and supervisor receive stipulated amounts in cash per month as salary, plus perquisites, which usually include a house, vegetables, and milk. The manager usually receives approximately 10 percent of the net profits from tobacco and an assistant manager or supervisor 2 1/2 percent of the net profits from tobacco.

## Fertilizer

The prices of fertilizers are fairly high - 2-18-15 mixture is approximately $75 per ton, 4-18-15 mixture about $82 per ton and superphosphate (19 percent) about $40 per ton. Fertilizer prices were decreased about 10 percent late in 1953. There is such a wide range in the amounts of fertilizer applied per acre by the various growers that no cost per farm can be said to be typical.

## Curing

Wood is the cheapest fuel for curing, if it is available on the farm; but it is not available on many farms. Four cords of wood for curing are required per curing per barn 16' x 16', in which about 1000 pounds of leaf are cured. An adult native male cuts about one cord of wood per day and his wages are equivalent to about 30 cents per day. The total cost of getting wood to the barn is about 70 cents per cord. On this basis, the cost of wood for curing would be equivalent to about $2.80 per barn or 0.28 U. S. cents per pound of tobacco.

Southern Rhodesian coal delivered to the farm in 1953 cost the farmer about $7.00 per ton. About two tons of coal are required to cure 1000 pounds of leaf tobacco. On this basis, the curing costs with coal would be about 1.4 U.S. cents per pound of tobacco.

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There is a very rapid shift of the use of oil, partly because wood is scarce in many areas and coal supplies are not always assured due to the shortage of railroad transportation. The price of oil is about 24 cents per U. S. gallon, which is very high in comparison with the prices paid by U. S. farmers. For curing one barn of leaf 16' x 16' and 8 tiers high, about 120 U. S. gallons of oil are required. On this basis, the curing cost is approximately 2.9 U. S. cents per pound of tobacco.

### Grading

A considerable portion of the leaf is commercially graded. This is rather expensive as rates currently are 4 to 4 1/2 pence (4.6 to 5.0 U. S. cents) per pound for grading and baling.

Grading like transplanting is a task which is frequently not done satisfactorily in Southern Rhodesia. Presently, European (white) supervisors are universally employed and even then it is difficult to get the job done correctly. In a grading shed with 1 to 4 Europeans and 100 natives an average of only about 3000 pounds (30 pounds per worker) per day is handled. Payment on a piece rate basis increases the rate of performance, but close supervision is required in order to get the job done properly. Women and children practically always assist in this task.

### Major Investment Items

It is not feasible to ascertain a meaningful average value for tobacco farms as sales prices vary with the distance from major cities, railroads, and roads; availability of water; amount of cleared land; building improvements and productivity. However, there are a few items of investment which can be indicated. Exclusive of land, some of the major investment items are machinery and equipment, transport vehicles, water supplies, tobacco curing barns and grading sheds.

### Barns

On the typical farm there are two units with four barns in each unit (each barn is 16' x 16' - 8 tiers high). The four barns in each unit are separated by partition walls. They are made of brick, as wood is scarce and termites quickly destroy wood. Each barn has its own individual heating unit. It is recommended that there be at least one barn 16' x 16' for each six acres of tobacco. If this recommendation were fulfilled, about 12 barns would be required on the typical tobacco farm.

Bricks, which are usually burned on the farm or by migratory crews who do custon work, actually cost about $5.60 per thousand bricks. No cement is used between the bricks. Practically the only material used in making the brick is the wet sand taken from anthills.

The average curing building of four barns each costs about $2000. Thus, the initial investment for eight curing barns on the typical farm would be $4000, but if recommendations were followed, this cost would be $6000 per farm.

## Tying and Grading Sheds

The initial cost of grading sheds varies greatly, but the average is about $1400 each. In addition to a grading shed, on most farms there is a long shed-type building with a thatched roof and open sides in which the tobacco leaves from the field are tied on sticks and racked before being moved into the curing barn. Usually, very little cash outlay is involved in the construction of this building, but considerable hand labor is required in constructing it.

## Housing for Managerial Personnel and Natives

The manager's house may cost from $1500 to $6000, and if there is an assistant manager or supervisor, he is also furnished a house, which probably would cost somewhat less. The "rondovals" (hut made of mud and poles) furnished to native workers do not cost much as they are built by the natives; however, some improved houses requiring greater investment are furnished.

## Boreholes and Water Facilities

On practically all farms there are one or more boreholes (well for water), which furnish water used on tobacco. These cost around 30 shillings ($4.20 U.S.) per foot or about $420 per hole 100 feet deep. The casing and pump cost $425 to $500. Piping costs an average of $40 to $50 per well. As water is found in only about half of the holes drilled, two holes are usually drilled for every producing well; thus, an extra $420 should be added to the expenses of each producing well in order to take care of the cost of drilling dry holes. The total cost to drill a well and install the necessary pipe varies between $500 and $1400 or with an average of about $1000. Usually a dam is built, which has an average storage capacity of about 3 million gallons of water and costs about $850 to construct.

## Tractors, Machinery, Equipment, and Transport Vehicles

The field equipment for production of tobacco and other crops usually includes a tractor, plows, disc, harrow, trailer, etc., which initially costs from $4500 to $6000. In addition, most operators own a pickup or regular truck, which would be used on tobacco as well as on other crop and livestock enterprises. The price of such vehicles varies from $1700 to $3000.

## Flue-cured Varieties

In the 1953-54 crop year (harvested February - April, 1954), Hicks and White-Stem Orinoco were the two leading varieties with Delcrest, Bonanza, and Jamaica Wrapper each accounting for approximately equal amounts of the remainder.

There is a vigorous program of testing and selection for higher yielding varieties, which will produce a high proportion of bodied leaf suitable for the United Kingdom market. Some buyers maintain that some of the present higher yielding varieties do not produce satisfactory quality leaf. The climatic and soil condition of Rhodesia are quite different from those countries from which the current varieties were obtained for introduction into Southern Rhodesia. Because of this, characteristics of plants produced in Southern Rhodesia are materially different from those of the same variety in the country in which it originated. There is a greatly expanded research program on varieties, soil and fertilizers in relation to yields and quality of product. As a result of work now underway by the recently expanded tobacco research staff, significant changes in recommendations relative to these aspects are expected.

## Some Important Diseases and Pests

White mold is prevalent with considerable spotting and dark discolored areas resulting. This seems to be worse at high altitudes, especially if there is a rainy period just prior to or during the curing season. The discoloration significantly decreases the price received and undoubtedly affects flavor and aroma of the leaf. However, some manufacturers indicated that the burning qualities do not seem to be adversely affected by this malady. As yet, research has not established the main conditions favorable to this disease and there are no reliable recommendations for preventing or treating.

Altaneria leaf spot is prevalent in most parts of Southern Rhodesia, particularly at high elevations in years of heavy rainfall late in the growing season. This results in brown leaf spots similar to those caused by Cicostora in the United States. Discoloration and decreased weight of leaf substantially reduce the value of affected crops.

Houseburning (locally known as pole burn) is widespread, particularly in a wet harvest season. This is intensified as barn space is inadequate on many farms, especially in years when yields are above average. Shortening the "color-fixing" period by increasing temperature and moisture and then drying the leaf quickly is now recommended. Some operators say that curing with steam heat decreases the damage and improves quality.

Frog eye is present, but does not seem to be very serious. This disease reduces the weight of affected leaf, but does not seem to decrease greatly the price offered for such leaf. In the past, it was recommended that affected leaves on the bottom be primed, but this has been changed, as it is now believed that the disease is spread to other plants by contamination of the hands.

Granville wilt has been identified in one area, but presently is not widespread.

Nematodes (eelworms) are prevalent and the damage from infestation is fairly great. However, damage from this pest has been kept down by shifting tobacco to new land or planting on land free of eelworms rather than through treating badly infested areas. Experiments have been carried out relative to effectiveness and economy of various control measures.

Magnesium deficiency (sand-drown) is prevalent and the typical grayish white color resulting was obvious on a significant proportion of the crop marketed in the early part of the 1954 season. This has recently been identified by local tobacco research personnel, and fertilizer manufacturers are expected to add enough magnesium to overcome this deficiency.

Aphids or Greenflies. The infestations vary considerably from year to year, but they were quite prevalent in the northern part of the tobacco area during 1953-54. These insects pierce and damage the leaves, weaken the plant and transmit diseases, especially "Rosette."

Tobacco Beetle. The losses from the infestations of beetles in stored tobacco are often high. Most storage buildings are not constructed in such a manner that an effective job of fumigation can be carried out. Some buyers transport leaf considerable distances where there are storage buildings in which the tobacco can be fumigated.

After the crop is harvested, each producer is required to uproot the stalks and take other specified measures by a certain date in order to minimize the carryover of diseases.

## Marketing

All tobacco, except Turkish, is sold by auction in the two large modern warehouses in Salisbury. Redrying facilities are conveniently located in the area. The leaf is baled on the farm or in commercial grading sheds and is shipped to the auction houses and sold in this form. The bales are wrapped with burlap lined with waterproof tar-paper. This is a convenient and efficient form for shipping and handling the leaf, and is an aid in maintaining the leaf in "condition", as there is practically no rain during the marketing season. Each grower is assigned a number, which he retains as long as he remains a producer. This number is stamped on each bale of his crop; thus, a check can readily be made in connection with evaluating the grading, etc. of various producers. Each bale is opened on the auction floor so the leaf can be inspected by buyers. After the tobacco is sold, the bale is resewed before removing from the warehouse floor. Sales in each warehouse are conducted about 4.5 to 5 hours per day with an average of 225 to 250 sold per hour.

After tobacco is purchased, if the buyer finds (before the bale is removed from the warehouse floor) that hands of various grades are mixed in the bale, he may refuse to accept the bale, in which case the producer must regrade it. Professional graders, representing producers on the auction floors, may reject the price bid for a particular bale without the farmer being present. Such bales are sold on later auctions.

As the auction floors, processing equipment, and sometimes transportation are not adequate for handling the entire crop in a short period without some controls, it has been found advantageous to regulate the rate of marketing by individual growers. Each grower is assigned a maximum "delivery quota", which he can ship for sale at the auction warehouses only within specified periods. The "delivery quotas" are assigned on a fortnightly (2-week) basis, and the amount allotted to an individual producer in a particular 2-week period is based on his production for the previous 5-year period.

Most tobacco is exported in bales, but a considerable amount is shipped in boxes or hogsheads containing approximately 400 pounds. Most of the tobacco for export moves by rail from Salisbury to Beira, Mozambique (Portuguese East Africa) where it is loaded on ships.

## SOUTHERN RHODESIA

### Prices and Quality of Rhodesian Flue-Cured

Southern Rhodesian flue-cured is a neutral filler, which is not comparable with U. S. leaf in regard to aroma, flavor or texture. The leaf is heavier-bodied than is U. S. leaf. Much of the leaf is bright in color, although disease and poor curing frequently result in a relatively high proportion of dark and spotted leaves.

Usually there is a strong demand for the better grades of Southern Rhodesian flue-cured, and the prices paid for such grades during the first six weeks of the 1954 marketing season, which began on March 23, were 10 to 20 percent higher than prices paid for similar quality leaf in the United States in 1953. The prices of Southern Rhodesian low-grade tobacco during this period were considerably below the levels of 1953. Many of the low-medium and low grades early in the 1954 marketing season were selling for only 30 to 50 percent of the prices paid for similar quality leaf in the United States in 1953. The average price received for Southern Rhodesian flue-cured sold on Salisbury auction floors in the first six weeks of the 1954 marketing season was 35.6 pence (41.5 U.S. cents) as compared to 47.7 pence (55.6 U. S. cents), substantially below the level of the similar period of 1953. The average for the total sales of the first 10 weeks (ending May 20) was 37.08 pence (43.3 U. S. cents). In the tenth week of sales ending May 27, the average price was 41.71 pence (48.7 U. S. cents) and in the eleventh week 42.5 pence (49.1 U.S. cents) was received. The price had risen steadily so that the average seasonal price through June 29 was reported as 38.84 pence (45.1 U. S. cents).

It is reported that, beginning in late May, demand for all grades of Southern Rhodesian flue-cured began to strengthen. That trend was still evident in the early part of July. Part of the increase in prices was attributable to improved quality of crop marketed. The demand for "English" types of leaf with good body, texture, and flavor was very strong in late June. The increase in average prices in the last few weeks has been chiefly due to very sharp increases in prices of low-medium and low grades such as nondescript and strips, which in June were described as heavier, but no brighter than earlier marketings.

Part of the increase in price was undoubtedly due to the decrease in estimates of the amounts of Southern and Northern Rhodesian flue-cured available in the 1954 marketing season. Some of the increase in price was due to the offerings of leaf of better quality than earlier in the season. Also, it is believed that certain United Kingdom purchasers were concerned that average prices paid earlier in the season were not sufficient to stimulate increased flue-cured production in the Federation, which is the most important non-dollar source of United Kingdom tobacco.

It is well known that the United kingdom demand for flue-cured is primarily for bodied tobacco that is considerably heavier than that desired by U. S. manufacturers; therefore, there is a special effort to produce this kind of leaf. There is a wider variation from year-to-year in quality leaf in Southern Rhodesia than in the United States. This is partly due to wider differences in rainfall pattern and number of cloudy days during the growing season. Also, the quality of Rhodesian leaf frequently varies significantly by "curings," depending on the weather during the particular "curing." With such large acreages of flue-cured handled per farmer, the transplantings are staggered and the harvest period is relatively long. Some "curings" are made while the rainy season is in progress; while others are made after the rains have terminated. This has considerable influence on the degree of houseburning and color of leaf resulting.

Prices

Southern Rhodesia: Average prices received per pound by farmers, 1937-54

| Period | Flue-Cured |  | Fire-Cured |  | Turkish |  |
|---|---|---|---|---|---|---|
|  | Pence | U. S. Cents 1/ | Pence | U.S. Cents 1/ | Pence | U. S. Cents 1/ |
| 1937-39 | 10.34 | 12.1 | 6.67 | 7.8 | 2/ | 2/ |
| 1940-44 | 16.60 | 19.4 | 9.05 | 10.6 | 16.80 | 19.6 |
| 1945 | 20.00 | 23.3 | 8.86 | 10.3 | 23.00 | 26.8 |
| 1946 | 32.35 | 37.8 | 16.96 | 19.8 | 21.70 | 25.3 |
| 1947 | 29.12 | 34.0 | 14.55 | 17.0 | 15.29 | 17.8 |
| 1948 | 32.55 | 38.0 | 18.39 | 21.5 | 3/ | 3/ |
| 1949 | 31.86 | 37.2 | 17.56 | 20.5 | 3/ | 3/ |
| 1950 | 37.65 | 43.9 | 16.70 | 19.5 | 3/ | 3/ |
| 1951 | 34.58 | 40.4 | 16.13 | 18.8 | 3/ | 3/ |
| 1952 | 42.83 | 40.0 | 13.21 | 15.4 | 3/ | 3/ |
| 1953 | 39.70 | 46.3 | 16.76 | 19.6 | 3/ | 3/ |
| 1954 4/ | 37.08 | 43.3 | 10.22 | 11.9 | 3/ | 3/ |

1/ Pence converted to U. S. Cents on the basis of $2.80 per Southern Rhodesian £.
2/ Not available.
3/ From 1948 to 1952 compulsory marketing of Turkish leaf through a cooperative society was in force. In 1953, free sales were again permitted, but no data are available for 1953 and 1954.
4/ Through week ending May 20, 1954. Average prices for sales of week ending May 27, 1954 were 48.7 U. S. cents for flue-cured and 13.4 U. S. cents for fire-cured.

On the basis of prices paid for lower grades of Southern Rhodesian flue-cured in the first six weeks of the 1954 marketing season, some of this tobacco could be sold at a profit in the United States even with the 15 cents per pound import duty on unmanufactured leaf. Tobacco purchased since the prices have increased could no longer be sold at a profit in the United States.

As indicated above, the average price received for Southern Rhodesian flue-cured rose in late May and June, and we know that the largest relative increases were for the low grades, but available data are not adequate for determining the recent prices paid by grades. The table below was worked out on the basis of sales during the first six weeks of the 1954 marketing season. This was done chiefly by two buyers, who had been on the markets since the season opened and the author who was on the Salisbury markets for about three weeks in April. While these estimates may not be precisely accurate, they are believed to be adequate for comparison of relative prices paid in Southern Rhodesia in the early part of the 1954 season and the United States during 1953. During the first six weeks of the 1954 marketing season, there was practically no tobacco sold in Southern Rhodesia that was comparable to our wrapper grades. Because of this, a comparison of prices paid for these grades would be of little value. The table does not include certain grades which are chiefly sold as chewing tobacco grades in the United States, but are not sold as such in Southern Rhodesia.

## SOUTHERN RHODESIA

From observation during this period, one concludes that in addition to demand for heavier-bodied leaf, buyers for the U. K. market place a higher premium on bright, buff color than do the majority of U. S. buyers for the domestic market. British tobacco publications frequently state that demand is for bodied leaf, but minimize the importance of bright color; however, on the basis of purchases paid during the March-May 1953 period, the premium prices paid for bright color leaf by U. K. buyers were great.

The major categories (wrapper, leaf, etc.) into which the grades are grouped vary somewhat from those used in the United States, but comparison of the relative proportions of recent crops in each major group of grades is useful. The Rhodesian system has been changed this year so that the grading system in the future will be more nearly comparable with that used in the United States.

Comparison of U.S. 1953 flue-cured prices with those received for Southern Rhodesian leaf in first six weeks of 1954 marketing season (March 23 - May 11)

| U.S. Group and Grade | U.S. 1953 Loan Rate 11-13 | U.S. Avg. 1953 Seasonal Price 11-14 | Estimated average prices paid for Southern Rhodesian flue-cured sold first six weeks of 1954 marketing season (3/23-5/11) |
|---|---|---|---|
| Leaf: | U. S. Cents per pound | U. S. Cents per pound | U. S. Cents per pound |
| B1L | 66 | 72 | 82 |
| B2L | 65 | 69 | 82 |
| B2F | 61 | 68 | 81 |
| B3L | 60 | 67 | 81 |
| B3F | 57 | 66 | 80 |
| B3R | 46 | 52 | 64 |
| B3FV | 50 | 60 | 63 |
| B3LV | 56 | 64 | 77 |
| B4L | 55 | 64 | 76 |
| B4F | 51 | 60 | 76 |
| B4R | 37 | 40 | 24 |
| B4LV | 50 | 59 | 69 |
| B4K | 43 | 49 | 48 |
| B4KR | 41 | 53 | 55 |
| B4GL | 45 | 55 | 69 |
| B5L | 49 | 59 | 69 |
| B5F | 41 | 52 | 67 |
| B5R | 30 | 32 | 6 |
| B5LV | 43 | 53 | 59 |
| BK5 | 36 | 40 | 21 |
| B6L | 39 | 52 | 58 |
| B6F | 31 | 43 | 56 |
| B6R | 24 | 26 | 6 |
| B6K | 25 | 32 | 6 |
| B6GL | 32 | 38 | 38 |
| Smoking Leaf: | | | |
| H1L | 67 | 71 | 81 |
| H1F | 65 | 71 | 81 |
| H2L | 65 | 70 | 80 |
| H2F | 64 | 69 | 80 |
| H3L | 64 | 69 | 80 |
| H3F | 61 | 68 | 77 |
| H3R | 47 | 53 | 35 |

(cont.)

## SOUTHERN RHODESIA

| U.S.Group and Grade | U.S. 1953 Loan Rate 11-13 | U.S. Avg. 1953 Seasonal Price 11-14 | Estimated average prices paid for Southern Rhodesian flue-cured sold first six weeks of 1954 marketing season(3/23-5/11) |
|---|---|---|---|
| Smoking Leaf (cont.) | U.S.Cents per pound | U.S. Cents per pound | U. S. Cents per pound |
| H4L | 61 | 67 | 78 |
| H4F | 56 | 65 | 59 |
| H4R | 42 | 51 | 30 |
| H5L | 55 | 64 | 50 |
| H5F | 51 | 60 | 22 |
| H5R | 35 | 46 | 22 |
| H6L | 46 | 59 | 44 |
| H6F | 39 | 53 | 7 |
| H6R | 27 | 40 | 10 |
| Cutters: | | | |
| C3F | 68 | 70 | 80 |
| C4L | 68 | 69 | 80 |
| C4F | 67 | 69 | 70 |
| C4LV | 60 | 67 | 79 |
| C5L | 64 | 67 | 77 |
| C5F | 62 | 66 | 65 |
| C5LV | 56 | 63 | 70 |
| C5KR | 48 | 58 | 51 |
| Lugs: | | | |
| X1L | 68 | 69 | 81 |
| X2L | 67 | 68 | 80 |
| X3L | 64 | 67 | 78 |
| X3LV | 53 | 60 | 66 |
| X3FV | 50 | 59 | 29 |
| X3G | 38 | 48 | 52 |
| X4L | 55 | 62 | 72 |
| X4F | 51 | 60 | 35 |
| X4LV | 44 | 53 | 52 |
| X4FV | 42 | 49 | 21 |
| X4K | 40 | 51 | 17 |
| X4G | 30 | 37 | 36 |
| X5L | 40 | 52 | 52 |
| X5F | 35 | 49 | 19 |
| Primings: | | | |
| P3L | 53 | 63 | 41 |
| P3F | 44 | 56 | 20 |
| P4L | 29 | 44 | 11 |
| P4F | 37 | 51 | 12 |
| P4G | 23 | 33 | 11 |
| P5L | 29 | 44 | 11 |
| Nondescript: | | | |
| N1R | 14 | 20 | 8 |
| N1GL | 14 | 19 | 7 |

No sale in Rhodesia to five pence per pound.

## SOUTHERN RHODESIA

In the 1948-53 period, an average of 43.5 percent of the Southern Rhodesian leaf was in the wrapper and two leaf categories, while in the United States 58.5 percent of the total production in the 1945-53 period was in the wrapper and leaf grades. In the periods indicated above 15.8 percent of the Southern Rhodesian tobacco was cutters, while 12.9 percent of the U.S. output was in this class. In the periods cited above, 12 percent of both the Southern Rhodesian and U. S. production was classed as lugs. About 25.8 percent of the Southern Rhodesian crops in 1948-53 was nondescript, strips and scrap (21.5 percent nondescript, 1.4 percent mixed, 1.8 percent strip, and 1.1 scrap). Southern Rhodesia has no separate gradethat can be considered equivalent to our "primings" category. In the 1948-53 period, about 4.6 percent of U. S. flue-cured production was primings. Nondescript leaf in this period accounted for about 22 percent of the Southern Rhodesian output, while only 5.6 percent of the U. S. tobacco was in this category. Much of the Southern Rhodesian strip should also be lumped with nondescript, as it is largely broken leaves and parts of damaged leaves which generally are of low quality. The proportion of nondescript in the Southern Rhodesian crops varies greatly from year-to-year being about 13.2 percent in 1948, 24.5 percent in 1949, 17.0 percent in 1950, 32 percent in 1951, 28.0 percent in 1952, and 31.5 percent in 1953. In the last seven years, about 26 percent of the Southern Rhodesian production was nondescript, mixed, strip, and scrap combined as compared to 11.3 percent of U.S. output in primings, nondescript and "others" taken together.

It is obvious that a lower proportion of Southern Rhodesian output has been in the leaf grades and about four times as high a proportion of Southern Rhodesian production has been in the nondescript category - as compared to the percentage of U. S. output in this group of grades.

Proportion of Southern Rhodesian flue-cured leaf by grade groupings, 1948-53

| Grade Groupings | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | 1948-53 1/ |
|---|---|---|---|---|---|---|---|
| | Percent | Percent | Percent | Percent | Percent | Percent | Percent |
| Wrapper | 0.74 | 0.33 | 0.18 | 0.04 | 0.06 | 0.03 | .23 |
| Leaf | 49.53 | 48.30 | 48.68 | 39.56 | 35.69 | 37.68 | 43.24 |
| Subleaf | 2.11 | 2.19 | 2.77 | 4.19 | 2.78 | 3.85 | 2.98 |
| Cutters | 21.07 | 15.44 | 19.13 | 9.79 | 18.25 | 11.03 | 15.79 |
| Lugs | 11.13 | 9.22 | 12.20 | 10.23 | 15.19 | 13.87 | 11.97 |
| Nondescript and mixed 2/ | 13.18 | 21.41 | 13.31 | 32.98 | 25.07 | 31.49 | 22.91 |
| Strips | 1.06 | 1.57 | 2.13 | 2.24 | 2.10 | 1.40 | 1.75 |
| Scrap | 1.18 | 1.54 | 1.60 | 0.97 | 0.86 | 0.65 | 1.13 |
| TOTAL | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 |

1/ Straight average

2/ It is estimated that normally between 1.25 and 2.00 percent is classed as mixed and retained by the buyer.

Source: Rhodesian Tobacco Journal - January 1954.

## SOUTHERN RHODESIA

Average proportions of the total U. S. flue-cured crops in the 1948-53 period in the various grade groupings

| U.S. Grade Groupings | Percent |
|---|---|
| Wrapper | .09 |
| Leaf | 46.17 |
| Smoking leaf | 12.31 |
| Cutters | 12.90 |
| Lugs | 17.03 |
| Primings | 4.59 |
| Nondescript | 5.55 |
| Other 1/ | 1.36 |
| TOTAL | 100.00 |

1/ Includes tobacco with too much moisture, unsound or damaged, nested (hands of various grades mixed together) and off-type leaf.

While the average quality of Southern Rhodesian leaf is much lower than that of U.S. leaf, much is being done to improve their tobaccos. It is essential that we in the United States make greater efforts to improve the quality of our leaf as rapidly as possible. Even with increased emphasis on quality, we are not likely to maintain our present margin as compared to Rhodesian leaf.

### Exports

There are no accurate estimates on consumption of leaf within the Federation, but it amounts to several million pounds per year. The remainder of the crop is exported. Most of the exports go to the United Kingdom and Australia under five-year purchase agreements which guarantee specified minimum levels of shipments (providing sufficient quantities of the desired grades are available at appropriate prices). Southern Rhodesian exports are stabilized to a certain extent for the next five years through these five-year purchase agreements with the United Kingdom and Australia.

The British Tobacco Board of Trade has a five-year agreement with the Southern Rhodesian Tobacco Marketing Board which provides that the United Kingdom take a minimum of 85 million pounds of Southern Rhodesian flue-cured per year in 1954 and 1955, and 80 million pounds annually in 1956, 1957 and 1958, if provisions one and two below are met without any decline in U.K. consumption. This type of agreement has been in effect many years and is extended each year so that at any time the five-year period ahead is covered. The above minimum purchases by the U.K. are assured if:

(1) Sufficient quantities of suitable grades are available;
(2) The price is reasonable; and
(3) Consumption in the United Kingdom does not decline.

In connection with number (3) above, the agreement provides that if U.K. consumption declines by specified percentages, the U.K. has the privilege of decreasing imports by specified percentages from the amounts that would otherwise be taken.

## SOUTHERN RHODESIA

Through a five-year purchase agreement, the Australian buyers undertake the purchase of not less than 9.72 million pounds of Southern Rhodesian flue-cured leaf per year or 6-1/2 percent of the total crop, whichever is less. The Australian takings of Southern Rhodesian flue-cured have expanded rapidly from 3 million pounds in 1947-48 to 8.5 million in the 1953-54 marketing year.

In 1953, there was a trade agreement between Southern Rhodesia and France which provided for French purchases of flue-cured valued at Ł215,000 ($602,000) and fire-cured valued at Ł25,000 ($70,000). Information is not readily available as to whether or not such an agreement is now in effect.

In the past five years, the U.K. has imported about 60 percent of the Southern Rhodesian flue-cured. The 1950-51 takings of 61.1 million pounds (export weight) by the U. K. is an all time high to date. Southern Rhodesian shipments to the United Kingdom in 1952 and 1953 were about double the levels of 1947 and 1948. This year takings by the U.K. are expected to be somewhat above 1952 and 1953 levels. In the last few years, the United Kingdom has taken only 70 to 80 percent of the minimum amounts specified in the purchase agreements. This was largely due to the fact that the quantities of better leaf desired by the United Kingdom were not available. During 1953, Southern Rhodesia exported 87.3 million pounds of flue-cured leaf, of which 57.2 went to the United Kingdom, 8.2 to Australia, 6.1 to the Netherlands, 3.0 to Germany, with 12.7 million to all other countries. During and after World War II, there were export controls which limited the exports to certain areas. These were lifted entirely in 1952, with auctions open to all buyers since that time.

Southern Rhodesia: Exports of flue-cured leaf by years, April 1 - March 31
(Export Weight)

| Destination | 1947-48 | 1948-49 | 1949-50 | 1950-51 | 1951-52 | 1952-53 | 1953-54 |
|---|---|---|---|---|---|---|---|
| | Million Pounds | Million Pounds | Million Pounds | Million Pounds | Million Pounds | Million Pounds | Million Pounds |
| United Kingdom | 29.1 | 41.4 | 46.1 | 61.1 | 42.7 | 54.3 | 52.9 |
| Australia | 3.0 | 6.3 | 4.4 | 6.1 | 4.4 | 7.0 | 8.5 |
| Netherlands | 1.0 | 2.0 | 1.3 | 3.0 | 4.8 | 7.5 | 5.9 |
| Denmark | 1/ | 2.6 | 2.8 | 4.8 | 3.8 | 3.4 | 3.0 |
| Germany (West) | 1/ | 1/ | 2/ | 2/ | 0.5 | 3.8 | 3.0 |
| Belgian Congo | 1/ | 0.3 | 0.6 | 0.9 | 0.9 | 0.9 | 2.2 |
| Sweden | 1/ | 0.6 | 0.6 | 0.7 | 0.8 | 1.5 | 1.2 |
| Union of South Africa | 5.1 | 2.6 | 4.5 | 3.2 | 2.5 | 1.9 | 1.0 |
| Nigeria | 0.5 | 0.7 | 0.7 | 1.5 | 3.0 | 1.2 | 0.8 |
| Belgium | 1/ | 1/ | 1/ | 2/ | 1.1 | 1.1 | 1.0 |
| Egypt | 3.4 | 4.8 | 3.4 | 4.0 | 0.9 | 1.5 | 1.0 |
| All other | 3.4 | 1.6 | 1.9 | 3.2 | 1.4 | 1.4 | 4.0 |
| Total | 45.5 | 62.9 | 66.3 | 88.5 | 67.9 | 85.5 | 84.5 |

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1/ If any, included in all other.

2/ Less than 100,000 pounds.

## SOUTHERN RHODESIA

The following are the seasonal figures of tobacco purchased for various countries on the Salisbury auction floors in the period March 23 - May 20, 1954. Farm Sales Weight.

| Country | Amount | Proportion of Total Sales |
|---|---|---|
| | 1,000 pounds | Percent |
| United Kingdom | 19,190 | 52.7 |
| Australia | 3,253 | 8.9 |
| Other Export Markets | 10,694 | 29.4 |
| Local Markets | 3,265 | 9.0 |
| Total | 36,402 | 100.0 |

Shipments to Australia, Netherlands, Germany, Sweden, Denmark, and Belgian Congo have increased in the last few years, while exports to the Union of South Africa and Egypt have declined materially.

Between March 23 - June 29, 1954, 59 million pounds of Southern Rhodesian flue-cured had been sold of which 34 million or 60 percent was purchased by the United Kingdom and 5.5 million or 9.8 percent by Australia.

Southern Rhodesia has a continuing policy of broadening their export base to as many countries as feasible while, at the same time, assuring at least minimum export outlets through purchase agreements with the United Kingdom and Australia. This program has been fairly successful, although with the exception of the United Kingdom, Rhodesia has not taken over a large share of the Western European markets. Rhodesia would have furnished more of the Western European imports if sufficient quantities of the better grades of flue-cured tobacco desired had been available at prices offered by other suppliers, particularly the United States and Canada.

Unmanufactured Rhodesian tobacco has a duty preference of 1 shilling 6-1/2 pence (equivalent to 21.6 U.S. cents) per pound in the U. K. market and 9 Australian pence (equivalent to 8.4 U.S. cents) per pound in the Australian market. If there were no preferential duty, Rhodesia could not compete effectively (on the basis of present prices) with the United States and Canada in regard to the sale of medium and higher grades of flue-cured leaf to the United Kingdom and Australia.

### Fire-Cured - Production

Production of fire-cured leaf has never been very important in Southern Rhodesia. Both the maximum acreages and production of the past 20 years were from the 1949-50 crop when 1.2 million pounds were grown on 1.76 million acres.

The average yields per acre of fire-cured have been about the same as for flue-cured, but the average prices of fire-cured have always been much lower and in recent years, have fallen relative to those for flue-cured. The level of prices for fire-cured have remained fairly stable since 1946 (averaging about 19 cents per pound in the 1946-53 period); while flue-cured prices have doubled since 1946. As labor is relatively plentiful for producing flue-cured and the prices and profits for flue-cured are higher than for fire-cured, the latter is at a competitive disadvantage in areas where flue-cured can be produced successfull

Most of the dark-fired leaf is grown in the Shamva area and is reported by buyers as normally less desirable for established export outlets than is the Nyasaland fire-cured. A significant portion of output is used in strong cigarettes consumed by the natives.

Exports of Fire-Cured

Normally, the United Kingdom is the largest importer of Southern Rhodesian fire-cured leaf. Bechuanaland (British Protectorate) usually imports from 70,000 to 100,000 pounds of this kind of Southern Rhodesian leaf annually. Australia and the Belgian Congo have taken some in recent years. Egypt took significant quantities several years ago, but has taken only minor amounts recently (none in 1952-53 and reportedly about 11 thousand pounds in 1953-54). Norway and Sweden purchased small amounts in 1950-51, but they normally do not purchase this kind of leaf from Southern Rhodesia.

Southern Rhodesia: Exports of dark fire-cured tobacco by country of destination, 1945-53 - Export Weight

| Destination | 1945-46 | 1946-47 | 1947-48 | 1948-49 | 1949-50 | 1950-51 | 1951-52 | 1952-53 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | | | |
| United Kingdom: | | | | | | | | |
| Leaf | 15 | 46 | 48 | 92 | 188 | 265 | 9 | 60 |
| Stripped | 94 | 86 | 125 | 169 | 69 | 125 | - | 46 |
| Bechuanaland | 69 | 73 | 117 | 68 | 76 | 83 | 97 | 96 |
| Belgian Congo | - | - | - | - | - | 78 | - | 56 |
| Norway | - | - | - | - | - | 30 | - | - |
| Australia | - | - | - | - | - | 43 | 54 | 72 |
| Sweden | - | - | - | - | - | 41 | - | - |
| Egypt | 96 | 62 | 78 | 10 | - | 72 | - | - |
| Other | 29 | 5 | 18 | - | 1/ 203 | 1 | 4 | 12 |
| Total | 303 | 272 | 386 | 339 | 536 | 738 | 164 | 342 |

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1/ This probably includes amounts shipped to some of the specified countries, but data are not readily available to determine destination.

Sources: "Economic and Statistical Bulletin of Southern Rhodesia," and "Rhodesian Tobacco Journal."

Southern Rhodesia: Exports of fire-cured and Turkish, 1938-54 - Export Weight

| Period 1/ | Fire-Cured | Turkish |
|---|---|---|
| | 1000 pounds | 1000 pounds |
| 1938-39 | 358 | 882 |
| 1943-44 | 105 | 1,762 |
| 1944-45 | 342 | 2,769 |
| 1945-46 | 292 | 3,286 |
| 1946-47 | 259 | 3,845 |
| 1947-48 | 382 | 2,819 |
| 1948-49 | 328 | 2,939 |
| 1949-50 | 536 | 1,499 |
| 1950-51 | 738 | 551 |
| 1951-52 | 164 | 219 |
| 1952-53 | 344 | 85 |
| 2/ 1953-54 | 82 | 170 |

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1/ Year beginning April 1.

2/ Preliminary.

Sources: "Economic and Statistical Bulletin of Southern Rhodesia" and "Rhodesian Tobacco Journal."

## Turkish

Production began in 1905 and expanded rapidly through the stimulus of strong demand, particularly by the Union of South Africa. The Union put an embargo on Turkish from Southern Rhodesia, but markets were expanding in the United Kingdom and in other parts of the world. At the peak of Turkish production in 1945-46 and 1946-47, about 4.8 million pounds were produced from 10.6 and 11.8 million acres respectively. The area devoted to this crop fell drastically in 1948 and 1949, and less than one-half million acres were grown in the 1951-53 period. Area of the 1953-54 crop increased somewhat above that of the previous year, but was still too small to attract buyers wishing to export in volume.

Most of the growers handle less than two acres per farm. Experiments this year were carried out in numerous areas in order to test the adaptability of soils and climate and the influences of fertilizers on yields, aromatic qualities, etc. While many farmers use little or no commercial fertilizers, local tobacco specialists recommend the application of 200 to 300 pounds or more (usually 4-18-15) per acre. Transplanting is carried out late in the growing season (January and February) so that the harvesting is after the rainy season has ended. Turkish leaf is cured in the open and is, therefore, damaged if there is rain. The usual harvest period is from about April 1 to June 1.

Selouk is the variety grown in the past. American companies prefer Samsoun, but farmers are prone to change as yields of Selouk are higher than for Samsoun.

## Marketing

Farmers do not grade the leaf, as it is sold on the string to the Turkish Cooperative. If leaf is sold in the bale, it must be sufficiently uniform in quality to warrant buyer confidence that he is getting the type of product desired. Individual crops are so small that it is not feasible for individual farmers to grade, blend, manipulate, and bale Turkish tobacco. There may be many problems involved if the farmer sells directly to manufacturer representatives through the auction system. Of course, these problems are eliminated or overcome if the buyer is willing to do the grading, blending, and manipulation after he purchases the leaf. Leaf from the various farms and curings must be blended in order to supply a significant volume of a uniform product. Manipulation and fermentation must be carried out in order to provide the type of product demanded.

Turkish tobacco shipped from Southern Rhodesia to some Northern Hemisphere markets undergoes fermentation and aging in ocean transport, which is equivalent to the changes that would require many months to accomplish under normal storage conditions in Northern Hemisphere countries.

A large labor supply is required for volume production. Because of the high labor inputs required, most people interested in increasing the output of Turkish leaf think that efforts to expand output should emphasize the development of production by natives. Due to relatively more ample labor supplies in the other two areas of the Federation, it might be easier to expand production in Northern Rhodesia and Nyasaland than in Southern Rhodesia. With limited labor supplies and current tobacco prices Turkish cannot compete successfully with flue-cured on farms operated by Europeans. Production may increase, but, on the basis of present yields and prices, it would appear very difficult to achieve any great expansion of output in the near future.

### Turkish Exports

The destination of Southern Rhodesian Turkish varies widely from year to year. Some is consumed locally with the bulk of exports in recent years sent to the United Kingdom, United States, Australia, Argentina, and Belgian Congo.

Production is now at such a low level that it is difficult to establish long-term outlets; however, buyers for the United Kingdom and United States are always interested in Turkish leaf.

## NORTHERN RHODESIA

### Introduction

The total land area is 287,640 square miles or roughly equivalent to the combined area of Kentucky, Tennessee, Virginia, North Carolina, South Carolina, and Georgia. With the exception of the valleys of the Luangwe, the Kafue and lower Zambesi Rivers, the altitude ranges between 3,000 and 4,000 feet above sea level. There was a total population of 2,015,000 in 1953 of which 1,960,000 were natives.

Most of the production is flue-cured, but some burley, Turkish and dark sun air-cured are grown. In the last few years flue-cured has accounted for over 97 percent of the total tobacco grown.

### Flue-Cured

There are only two important producing areas. The Eastern producing area is around Fort Jameson and the Western area, consisting of scattered farms in a band about 20 miles wide and 450 miles long, extends along the railroad from Livingston in the south through Choma, Lusaka, and Broken Hill to Kaperi Mposhi in the north. Production is extending into an area at Mkushi, which is now being opened for European settlement. Most of the expansion in recent years has been in the Western area. Output rose from 1.5 million pounds in the 1935-39 period to 9.5 million pounds in 1952 and a peak of 10.3 million in 1953, but declined to 8.0 million pounds in 1954.

Number of registered growers and acreage of flue-cured in Northern Rhodesia, 1952-53 and 1953-54

| Area | Registered Producers | | Acreage Planted | |
|---|---|---|---|---|
| | 1952-53 Crop | 1953-54 Crop | 1952-53 Crop | 1953-54 Crop |
| | Number | Number | Acres | Acres |
| East | 154 | 110 | 6,000 | 5,100 |
| West | 267 | 215 | 14,000 | 9,331 |
| Total | 421 | 325 | 20,000 | 14,431 |

Source: "Tobacco Intelligence" vol.6 No. 1, Feb.1954.

## NORTHERN RHODESIA

The crop in the Western area has long been sold on the Salisbury, Southern Rhodesia auction floors, and since direct consignments from Fort Jameson ceased in 1953, flue-cured from the Eastern area has also been sold in Salisbury. The levels of output in these wide-lying separated areas are not large enough to attract buyers to the production areas. Shipments for export, except those to the Union of South Africa, move by rail from Salisbury, Southern Rhodesia to the port of Beira, Mozambique; thus, it is logical to utilize existing facilities in Salisbury.

The altitude of the producing areas are between 3,000 and 4,000 feet with climate similar to that of Southern Rhodesia. Flue-cured from Northern Rhodesia is similar in quality to that of Southern Rhodesia, but many buyers seem to discriminate against Northern Rhodesian leaf. Buyers give various reasons for this, particularly poor burning qualities. This may be largely an attempt to hold down prices, as several tobacco specialists indicated that they believe that there is little difference between tobaccos from these areas.

All flue-cured is produced by Europeans with an average of 40 to 45 acres of tobacco per farm in the Eastern area and 45 to 55 in the Western area. Native labor is supervised closely, usually by Europeans. At this stage of native development, local tobacco experts consider it almost impossible to obtain satisfactory production from independent "native" growers.

In most backward areas, the native does not desire the continuous and rigid work schedules required to produce quality tobacco. Where land is available, the male native would prefer that he (or his wife if he is married) raise corn, peanuts, millet, etc., from which a living may be secured with less effort. The European tobacco farmer faces strong competition for available native laborers by the mines, employers of domestic servants and businesses, particularly those in the service industry category.

There are no purchase agreements covering Northern Rhodesian flue-cured. During and immediately after World War II, exports of Southern Rhodesian leaf to the major importing countries were under purchase agreements and there was a control or buyer quota system which, to a certain extent, held down or controlled the price and kept production from rising as fast as it would have under "free-market" prices. Although some flue-cured had long been grown in Northern Rhodesia, it was during this period when prices for Northern Rhodesian leaf rose substantially that the major expansion occurred. Prices in 1950 and 1951 rose sharply to about 45 cents per pound or 30 percent above the 1948 and 1949 levels. As indicated earlier, in response to these price increases production in 1952 and 1953 rose to record highs of 9.5 and 10.3 million pounds respectively. Prices fell in 1952 and 1953 with the Eastern area crop (sold at Fort Jameson) averaging only about 24 cents per pound in 1952 and 32 cents in 1953. The number of producers and acreage in 1954 declined significantly as indicated in the table above.

## NORTHERN RHODESIA

Northern Rhodesia: Production of leaf tobacco by kind, 1937-39 through 1953-54
(Farm Sales Weight)

| Period | Flue-Cured | | | Burley | Turkish | Dark Sun-Air-Cured |
|---|---|---|---|---|---|---|
| | Eastern Area | Western Area | Total | | | |
| | 1000 pounds | 1000 pounds | 1000 pounds | 1000 pounds | 1000 pounds | 1000 pounds |
| 1937-39 Avg. 1/ | 1,627 | 88 | 1,715 | - | 10 | 45 |
| 1940-44 Avg. 1/ | 2,392 | 240 | 2,632 | 47 | 26 | 2/ |
| 1944-45 | 2,058 | 240 | 2,298 | 85 | 423 | 31 |
| 1945-46 | 2,200 | 242 | 2,442 | 77 | 1,028 | 43 |
| 1946-47 | 2,823 | 307 | 3,130 | 125 | 1,027 | 82 |
| 1947-48 | 2,929 | 500 | 3,429 | 140 | 600 | 85 |
| 1948-49 | 2,988 | 732 | 3,770 | 179 | 134 | 91 |
| 1949-50 | 3,716 | 1,907 | 5,623 | 327 | 121 | 63 |
| 1950-51 | 3,202 | 3,208 | 6,410 | 253 | 72 | 50 |
| 1951-52 | 4,105 | 5,419 | 9,524 | 124 | 50 | 28 |
| 1952-53 | 3,585 | 6,739 | 10,324 | 120 | 30 | 20 |
| 1953-54 3/ | 3,000 | 5,000 | 8,000 | 105 | 100 | 2/ |

1/ Year of harvest.
2/ Not available.
3/ Preliminary.
Source: "Tobacco Intelligence" February 1952, November 1953 and May 1954, and various reports from U.S. Foreign Service Officers.

### Seedbeds

Plantbeds are three or four feet wide and usually 20 to 30 yards long. The open-fire method of sterilizing has usually been used and if the area is infested with eelworms, soil fumigants may be used. Seedbed preparation begins in late August and beds are sown at intervals of 7 to 10 days over a period of several weeks so that transplanting may be spread over a longer time period. Seeds are often stirred into water in a sprinkling can until they are suspended, then sprinkled with the water on the seedbed. Cheese cloth or grass mats are placed directly over the bed after it is seeded and left until germination is completed. These are raised above the ground level when the seeds have germinated. The beds are watered about three times per day until the seedlings are approximately six weeks old. The plants are then hardened by removing the shade (cheese cloth or grass mats) for longer intervals and reducing the number of waterings per day over a period of about two weeks, at which time they are then transplanted. Fertilizers or manures are sometimes used on the beds. Also, it is frequently necessary to treat the beds for mosaic or damping-off.

### Field Preparation

The soil is plowed and prepared about as is done in the United States. Plants are set on fairly high ridges in order to assure good drainage, as rains are frequently heavy during the growing season.

## NORTHERN RHODESIA

Although some producers use little or no fertilizer, others use several hundred pounds per acre. A portion of the fertilizer is usually applied prior to transplanting, with the remainder divided between two later side dressing applications. Fertilizer prices are considerably higher than in Southern Rhodesia largely due to the additional transportation charges from Salisbury through which it is shipped to Northern Rhodesia.

Recommended Varieties (This section is based partly in information from "Flue-Cured Tobacco in Northern Rhodesia" by Allan Carr, Agricultural Supervisor.)

1. Jamaica Wrapper - on lighter less fertile soils - is very susceptible to alternaria.
2. Bonanza - adaptable to various soils.
3. Willow leaf - same as Bonanza.
4. White Stem Orinoco - about same as Bonanza, except somewhat stronger plant.
5. Gold Dollar - adapted to heavier soils.
6. Warne - good, light color and heavy bodied leaf.

The above recommendations were made on the basis of data analyzed prior to 1951, and more recent information on other varieties tried is not readily available.

### Topping

The plants are topped when the flower appears or even while a majority of the plants are in the bud stage. Flue-cured is topped much lower and at an early stage of growth than in the United States. This is done in order to obtain bodied leaf desired by the United Kingdom.

### Diseases and Pests

The diseases and pests are about the same as those listed for Southern Rhodesia.

### Bulking and Grading

After the tobacco is cured, it is bulked then graded and baled as in Southern Rhodesia.

### Marketing

The baled leaf moves by truck or rail to Salisbury, Southern Rhodesia, where it is sold on the same auction floors as Southern Rhodesian leaf. Freight rates are rather high and with the extra transportation costs due to the longer distances of producing areas from the markets in Salisbury, Northern Rhodesian producers are at a competitive disadvantage as compared to Southern Rhodesian growers. Northern Rhodesian leaf is labeled as such and is sold separately on auction sales. This subject has been discussed with the Rhodesian Tobacco Marketing Board, and the practice may be terminated in the future, as procedures under Federation are adjusted to meet changing condition.

## NORTHERN RHODESIA

Northern Rhodesia: Average prices received on auction for flue-cured tobacco, 1945 - 1953

| Period | Flue-Cured Eastern Area | Flue-Cured Western Area |
|---|---|---|
| | U. S. Cents per Pound 1/ | |
| 1945 | 20.3 | 2/ |
| 1946 | 30.9 | 33.6 |
| 1947 | 30.7 | 30.6 |
| 1948 | 36.0 | 35.3 |
| 1949 | 37.9 | 36.7 |
| 1950 | 47.2 | 45.8 |
| 1951 | 43.2 | 44.5 |
| 1952 | 24.1 | 37.6 |
| 1953 | 31.9 | 40.7 |

1/ Converted from pence on the basis of one Rhodesian £ (pound) equivalent to $2.80 U.S. currency.
2/ Not available.

### Production Outlook

The prices received by Northern Rhodesian growers in recent years have been relatively low as compared to prices received in Southern Rhodesia. With increasing yields of peanut, corn, and certain other crops, the production of these crops becomes relatively more attractive unless tobacco yields can similarly be improved. On most tobacco farms (with the 1953-54 price-cost relationships) flue-cured production was the most profitable alternative available to the farmers. In the Western area there are large tracts of soils adaptable to flue-cured production, so the price-cost relationship is a key factor in regard to future levels of output. Some officials of the Northern Rhodesian Department of Agriculture think that in the future, there may be less emphasis on tobacco with smaller acreages of tobacco produced per farm and greater emphasis on diversified crop and livestock enterprises. It would be difficult to guess what may happen in this connection. Regardless of whether or not the acreage devoted to tobacco changes, it is essential that yield and quality of tobacco be improved. Output can be economically expanded substantially by improving yields without changing the acreage. Rising wage rates of natives will raise per unit costs unless labor is more efficiently utilized and yields of leaf are increased. Lack of experienced supervisors and poor performance of unskilled native laborers are important aspects of these problems.

Analysis of export data in regard to destination of Northern Rhodesian leaf is of very limited value, as information is available for only that part of the crop which has been shipped for export by direct consignment. Shipments of leaf for sale on Salisbury auctions are listed as exported to Southern Rhodesia, even though most of such leaf is re-exported. The amounts of such re-exported flue-cured going to individual countries are not readily available except for the United Kingdom and the Union of South Africa. However, the United Kingdom, Netherlands, Germany, Union of South Africa, Denmark, and Belgian Congo have taken the bulk of exports in recent years.

## NORTHERN RHODESIA

For several years the Union of South Africa and Northern Rhodesia had an agreement under which a maximum of 400,000 pounds of Northern Rhodesian leaf could move into the Union duty free. Until recently, all or almost the full amount exempt from import duties was shipped to the Union, but as production of Orinoco increases in the Union, imports from Northern Rhodesia will decline.

### Burley

Production of burley is not large and is confined to the Petauke district of the Eastern province. The crop harvested in 1954 was estimated at 105,000 pounds, the smallest production since 1945-46. Production increased for many years to a peak of 327,000 pounds in 1949-50, after which it has declined to present levels. The leaf is heavy and red, similar to the leaf produced in some areas of Kentucky and Tennessee many years ago. Most of the burley is used for smoking and chewing tobacco rather than for cigarettes. The consumption of the American-blend is increasing in most areas of Africa so that the future demand for burley in these areas is likely to increase.

The crop is grown entirely by natives, but local European farmers apparently are becoming somewhat more interested in the production of this kind of leaf. The seedlings are produced in seedbeds, grown under supervision of specialists of the Northern Rhodesian Government who then issue these plants to the natives. The acreage allocated per native family is based on the number of available workers. In recent years, Northern Rhodesian burley has been sold on the Limbe, Nyasaland markets.

Northern Rhodesian tobacco specialists expect the crop to remain at about current levels for the next two or three years and then expand slowly in response to an anticipated increase in demand. It would seem a bit uncertain to predict an increase in demand for burley from this area unless it would be for Western Europe or Africa, as burley is not used in cigarettes manufactured in the United Kingdom.

On the basis of comparative prices and yields in recent years, burley production appears to be an attractive alternative as compared to flue-cured in some areas.

### Dark Sun Air-Cured

Production is small, never exceeding 100,000 pounds. Peak output was reached in 1948-49 and has declined to less than 30,000 pounds in each of the last three years. Northern Rhodesian sun-cured is produced in an area very near the Nyasaland border, and the leaf has been marketed in Limbe, Nyasaland.

### Tobacco Products

There is no commercial production of cigarettes in Northern Rhodesia. Most of the tobacco products consumed are imported from Southern Rhodesia.

## Turkish

Most of the Turkish production is in the Western area along the railroad line from Livingston to Lusaka and is concentrated around Chomo, Kalomo, and Broken Hill. Although it is now produced on European farms, government and trade representatives interested in expanding output are considering the possibilities of promoting production by natives.

Production increased from about 10,000 pounds in the late 1930's to a peak of slightly over one million pounds in 1945-46 and 1946-47. Output declined rapidly to only 50,000 pounds in 1951-52 and 30,000 pounds in 1952-53. Production is reported to have increased to about 100,000 pounds this year, but firm estimates are not yet available for the 1953-54 crop.

Turkish leaf must be transplanted late in the season (late January to March), so that it can be cured in the sun without damage by rains, which cease in late March or early April. Also, heavy rains late in the growing stage of the plant destroy the gum and lower the quality of leaf.

Soils must be light, but fertile, if the leaf is to have the proper aromatic qualities. If the soil is heavy, the leaf produced is too large and coarse for the tobacco trade. Northern Rhodesia has large areas of adapted soil.

Seedbeds are planted from mid-November to January after the rainy season starts; therefore, it is not necessary to water them by hand as is required with other kinds of tobacco.

The diseases and pests are about the same as for other kinds of tobacco.

Turkish tobacco is not topped and suckering usually is not necessary. Most of the hand labor used is for picking and stringing the leaves.

Turkish may be sold on the string or in bales. If sold in bales, it is best to put each reaping (priming) in separate bales. In Northern Rhodesia, farmers are not required to grade the leaf; however, it is recommended that they place only leaves of the same size and color together in the bale.

On the basis of present yields and prices, Turkish cannot compete successfully in areas adapted to flue-cured production. Attempts are being made to expand output, but this will be difficult on the basis of current prices and hand labor requirements.

## Exports

Most of the leaf is reported as exported to the United States, but data as to destination of shipments are difficult to obtain as present production is small and relatively unimportant.

# NYASALAND

## Summary

In terms of value, tobacco is the largest export of Nyasaland, followed by tea, corn, and cotton. Dark fire-cured and dark sun-cured account for the bulk of production, but flue-cured is relatively important with some burley also grown. The area of adapted soils and available labor supply is adequate for considerable expansion of tobacco production. Dark fired and dark sun-cured can effectively compete on a price and quality basis with the United States for certain export markets; however, demand for fire-cured leaf is declining so that no great change in level of production is expected in the near future. There is a fairly strong demand for sun-cured and the production of this kind of leaf may increase. Average yields and prices of flue-cured are relatively low, but production is likely to increase, especially if quality improves. The United Kingdom will probably remain the most important customer. There may be some expansion in sales to other countries, but it will be difficult to displace other producing countries in shipments to established markets, except on the basis of lower prices for a particular quality of leaf. Burley output this year is at an all-time high and may increase gradually, although members of the Agriculture Department of Nyasaland indicated that they thought output would remain for some time at about current levels.

Nyasaland: Production of tobacco by kind, 1935-53

| Period 1/ | Fire-Cured | Sun Air-Cured | Flue-Cured | Burley |
|---|---|---|---|---|
| | 1000 pounds | 1000 pounds | 1000 pounds | 1000 pounds |
| 1935-39 | 12,149 | 2/ 188 | 2,267 | 2/ |
| 1940-44 | 16,357 | 2/ 3,516 | 2,832 | 2/ |
| 1945 | 15,114 | 2/ 3,532 | 1,937 | 2/ |
| 1946 | 12,038 | 1,920 | 2,349 | 847 |
| 1947 | 19,440 | 3,738 | 2,424 | 808 |
| 1948 | 19,065 | 2,534 | 2,328 | 1,103 |
| 1949 | 17,537 | 3,779 | 2,336 | 1,051 |
| 1950 | 23,444 | 4,246 | 2,352 | 807 |
| 1951 | 25,394 | 5,348 | 4,043 | 1,354 |
| 1952 | 15,484 | 2,994 | 3,460 | 998 |
| 1953 | 23,838 | 6,270 | 3,568 | 1,673 |
| 1954 3/ | 21,966 | 5,190 | 3,851 | 1,827 |

1/ Year of harvest.
2/ Burley was included in sun air-cured prior to 1946.
3/ Preliminary.
Source: "Tobacco Intelligence" and U.S. Consular reports.

The total land area is approximately 36,829 square miles. This is about nine-tenths the size of Kentucky or 85 percent of the land area of Virginia. There was a total population of 2,433,000 in 1953, of which about 2,420,000 were natives. Most of the non-native population lives in the Shire Highlands. Most of the tobacco is produced in three relatively limited areas.

## Fire-Cured Production

Dark fire-cured has always accounted for the bulk of production. This kind of leaf is used for chewing tobacco, snuff, and smoking tobacco.

The largest center of output is in the Central province at Lilongwe, which is about in the center of Nyasaland between Salima (near Lake Nyasa) and Fort Jameson in Northern Rhodesia. This area also accounts for most of the burley and dark sun-cured. About one million pounds of sun-cured are grown in an area extending from Golonoti to Balaka along the railroad about midway between Limbe and Salima. Approximately three-fourths of a million to one million pounds of fire-cured is grown in the Southern province, in the area just north of Mlanje and East of Limbe.

Most of the fire-cured is produced by natives, who cultivate very small acreages per family. Some is produced by tenants and hired workers on estates mostly in the Mlanje area.

The Western (Canadian) variety of fire-cured is grown and it is kept pure, as seed is produced only by the Department of Agriculture Experiment Station and issued to the natives.

All work on the Native Trust Land is by hand, with the preparation of land and cultivation done entirely with short handle hoes. In 1952-53, fertilize was used by the natives for the first time with 20 tons distributed by the African Tobacco Board. The natives expect the "magic medicine" to produce a mature plant overnight, but through training, which includes movies, the Board hopes to improve production practices. The women do most of the work, which makes it necessary that more training in tobacco culture be given to the females instead of only the males, as has previously been the practice.

In recent years, the Government subsidized the purchase of two-wheel carts by natives in order to increase the use of manure on crops and provide a means of transporting supplies and tobacco. Presently, practically all transportation by natives is done by "head load," mostly by females, as they do not have any work animals or mechanical transport equipment.

Tobacco is grown on rather high ridges frequently one to one and one-half foot high. This is done because of the heavy rains during the growing season. Tobacco has been grown on virgin soil, but this is almost impossible now. Yields are very low, frequently less than 200 pounds per acre. Although fertilizer is very expensive, it "pays" to use it. Most Nyasaland soils are deficient in nitrogen. In 1952, experiments at Lilongwe proved that the application of 200 pounds of sulphate of ammonia per acre more than doubled the yields as compared to untreated soils.

The time of transplanting is very important, with early plantings (when the rains first begin) usually preferable. During the dry season, the nitrate supply is increased and much of this is soon lost by leaching soon after the rains begin; thus, early planting is better. However, frequently rains are very heavy with many cloudy days in March and the early part of April, so that quality of early curings may be adversely affected. Tobacco matures and is cured in a period of falling temperatures, which also adversely affects quality, particularly at high altitudes. Plants are topped low with only 4 to 10 leaves left per plant. With dead or diseased leaves often primed and left in the field, probably only an average of six leaves per plant are actually harvested.

All tobacco is primed (fire-cured is not stalk-cut as in the U.S.). The leaves are picked and carried in baskets to the shade by women and the men and boys tie the leaves on sticks.

Barns are made of mud and sticks and the roof is usually thatch. In the past, almost all barns had pits. Frequently the barn is 17 feet by 13 feet outside with a pit 8 feet by 12 feet and 6 tiers high. Round huts about 8 or 10 feet in diameter are sometimes used. Because this kind of building is not adaptable for animal shelter or human habitation, such barns frequently are not kept in repair. If barns are used for other purposes during the rainly season, the natives are more likely to keep the buildings in usable condition. For this and other reasons, barns without pits are now recommended.

There is very often much poleburning (house burn) as barn space is insufficient and weather may be rainy during the curing period. The barns frequently are not built until the crop is about ready to harvest. It is difficult to estimate the amount of leaf to be marketed from looking at the crop in the field as much of it may not be harvested, due to lack of barn space, lack of incentive for doing the extra work required, etc. Also loss of leaf already in the barn may be great in rainy seasons as the mud walls of the barn become so wet that they collapse. All persons wishing to produce tobacco must register in order to be eligible. Through the African Tobacco Board records are kept of all native growers. The records are used as controls and growers are not reregistered unless they comply with certain minimum recommendations. In the future, the Board may assure that adequate barn space is provided as a basis of reregistering growers.

Wood for curing is scarce. Present recommendations of the Board are to produce a dark red leaf rather than a black heavy smoked one. While fuel should be sufficient to cure the leaf properly, the Board claims that the trend in consumer demand for fire-cured in the United Kingdom, Western Africa and Western Europe (where most Nyasaland leaf is consumed), is toward a leaf with less flavor of wood smoke. Buyers from the West Coast areas of Africa are very particular about grading, requiring that the leaves in a particular hand be uniform in length as well as in number of leaves.

## Prices

Prices have varied greatly during the last 10 years. The average price received on auctions rose from about 6.9 cents per pound in 1945 to a peak of 23.5 in 1949. Prices then declined to 18.3 cents per pound in 1950 and 13.6 cents in 1951. Part of the decline was due to poor quality leaf because of unfavorable weather. Prices then rose to 19.3 cents per pound in 1952 and averaged 16.3 cents in 1953. After the fall in prices in 1950 and 1951, the number of growers and acreage planted in 1951 for harvest in 1952 declined sharply. After the prices rose in 1952, the acreage planted in that year for harvest in 1953 increased substantially. Sales through July 10th of the 1954 marketing season of 7.3 million pounds of Northern fire cured averaged 16.48 pence (19.23 U.S. cents) per pound, while the 3.4 million pounds sold from the Southern flue-cured Division in the same period averaged 12.47 pence (14.55 U.S. cents) per pound.

Prices by grades to be paid to natives by the African Tobacco Board for Trust Land Dark Fire-Cured for the 1954 marketing season (purchases beginning May 9)

| Grade | Local Currency |  | U.S. Equivalent |
|---|---|---|---|
|  | Shilling | Pence | Cents |
| B1 | 1 | 9.0 | 24.5 |
| B2 | 1 | 4.0 | 18.7 |
| C1 | 1 | 5.0 | 19.8 |
| C2 | 0 | 11.0 | 12.8 |
| D | 1 | 6.0 | 21.0 |
| E1 | 1 | 1.0 | 15.2 |
| E2 | 0 | 9.0 | 10.5 |
| F | 0 | 6.0 | 7.0 |
| G | 0 | 4.0 | 4.7 |
| I | 0 | 2.5 | 3.1 |
| X | 0 | 1.0 | 1.2 |
| S | 0 | 0.5 | 0.6 |

Source: African Tobacco Board

The leaf is sorted into six length groups 23 inches and over, 19 to 23 in., 16 to 19 in., 12 to 16 in., 8 to 12 in., and less than 8 in. These are then sub-grouped into grades on the basis of color, body, degree of damage, etc. This year, additional grades were introduced largely in order to provide a premium for the better quality by increasing the price spread between high quality and low quality leaf.

Below is a copy of the 1954 classification notice sent to all receiving stations for dark fire-cured from African trust lands in the Northern Division.

## CLASSIFICATION OF AFRICAN TRUST LAND TOBACCO DARK FIRED 1954
## NORTHERN DIVISION

It has been arranged that Dark-fired tobacco purchased at the African Tobacco Board's Receiving Stations in the NORTHERN DIVISION from African Trust Land growers during 1954 shall be graded for purchase as follows:

(a) Grades as purchased from African growers:

| | | | |
|---|---|---|---|
| | GRADE 'B1' | Thick leaf, wrapper quality | 23" & over in length. |
| | " 'B2' | Good quality heavy-bodied filler sound leaf | 23" & over in length. |
| | " 'C1' | Good quality light-bodied filler sound leaf | 23" & over in length. |
| ⌿ | " 'C2' | Nondescript leaf: slightly spotted, slightly torn and/or damaged | 23" & over in length. |
| | " 'D' | Thick leaf, wrapper quality | 19" to 23" in length. |
| | " 'E1' | Good sound leaf - no trash, green or damaged leaf to be included | 19" to 23" in length. |
| ⌿ | " 'E2' | Indifferent quality leaf slightly damaged | 19" to 23" in length. |
| | " 'F' | Sound leaf | 16" to 19" in length. |
| | " 'G' | Sound leaf | 12" to 16" in length. |
| | " 'I' | Sound leaf | 8" to 12" in length. |
| | " 'X' | Will consist of tieable leaf, all lengths not suitable for inclusion in above grades. This grade to be presented to market tied. | |
| | " 'S' | Scrap to consist of all tobacco not suitable for inclusion in above grades. It should consist of small portions of leaf, dust and trash with little stem and no foreign matter. | |

(b) Tobacco sent from Tobacco Receiving Stations to be baled in grades as stated above and of a net weight of 205 pounds for each bale of dark-fired leaf. Gross weight 210 pounds (i.e. 3 pounds for hessian and 2 pounds for packing paper) and forwarded to Grading Centres.

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⌿ Perished and trashy leaf from grades 'C' and 'E' to be purchased as 'X' as before.

In the first 5 weeks of the 1954 marketing season (May 9 to June 12) 5.2 million pounds of fire-cured sold on Limbe auctions for an average 15.4 pence (17.9 U.S. cents) per pound. In June that portion of the crop marketed from the Central Province was of good quality, but much of that from the Southern Province was reported as somewhat thin and not cured sufficiently. The average quality is often fairly low. In 1953 over half of the fire-cured was in grades E1 and F.

Proportion of African Trust Land - Dark-Fired tobacco in Central Province (Northern Area) in specified grades in 1953

| Grade | Percent |
|---|---|
| B1 | 0.5 |
| C2 | 18.5 |
| D | 1.0 |
| E1 | 30.0 |
| F | 27.0 |
| G | 9.0 |
| X&S | 14.0 |
| Total | 100.0 |

Source: African Tobacco Board

## Exports

About half the exports are sent to the United Kingdom with the Belgian Congo usually the second largest customer. The third largest amount is usually sent to the British Territory of Sierra Leone on the west coast of Africa and significant quantities are shipped to other British territories of Africa, including the Gold Coast, Gambia, Liberia and Kenya. Egypt, Netherlands and the Canary Islands also take fairly large shipments with small quantities frequently sent to Belgium, Denmark, Sweden, Finland, Norway, Indo-China and French Equitorial Africa.

## Outlook

It is difficult to produce leaf of uniform quality over a period of years due to varying weather conditions. However, the African Tobacco Board expects quality to improve and it probably will with the present educational program and the controls which they have on use of improved practices through restriction of reregistration only to those growers who comply with recommendations of the Board.

While production may increase somewhat, world demand for this kind of leaf is rather limited and has been decreasing. Labor and adapted soils are ample for expanding production in Nyasaland, but foreign demand is limited and is likely to be the most important factor determining level of output.

NYASALAND: Distribution of domestic exports of unmanufactured tobacco country of destination and by type

| Type and Country of Destination | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Dark Fire-Cured: | | | | | | |
| United Kingdom | 9,518 | 12,663 | 9,414 | 9,580 | 5,998 | 8,347 |
| Sierra Leone | 1,214 | 1,479 | 1,146 | 1,405 | 1,539 | 1,826 |
| Egypt | 1,587 | 512 | 2,749 | 1,948 | 1,382 | 1,534 |
| Netherlands | 1,115 | 470 | 200 | 337 | 778 | 879 |
| Belgian Congo | 1,233 | 2,433 | 2,293 | 3,861 | 1,249 | 2,447 |
| Canary Islands | 698 | - | 188 | 752 | 151 | 932 |
| Other Countries | 2,393 | 1,526 | 1,849 | 1,430 | 2,644 | 1,937 |
| Total | 17,758 | 19,083 | 17,839 | 19,313 | 13,741 | 17,902 |
| Dark Sun Air-Cured: | | | | | | |
| United Kingdom | 2,626 | 2,899 | 3,072 | 3,368 | 2,016 | 3,128 |
| Egypt | 46 | 25 | 10 | 5 | - | - |
| Belgian Congo | 123 | 104 | 349 | 416 | 483 | 452 |
| Other Countries | 409 | - | 40 | 11 | 82 | 202 |
| Total | 3,204 | 3,028 | 3,471 | 3,800 | 2,581 | 3,782 |

Continued -

NYASALAND: Distribution of domestic exports of unmanufactured tobacco by country of destination and by type
(continued)

| Type and Country of Destination | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-Cured: | | | | | | |
| United Kingdom | 1,607 | 1,783 | 1,753 | 2,335 | 1,927 | 1,602 |
| Belgian Congo | - | 132 | 16 | 6 | 208 | 12 |
| Denmark | 10 | 100 | 8 | 2 | - | - |
| Netherlands | - | - | 29 | 54 | 305 | 331 |
| Other Countries | 457 | 265 | 314 | 272 | 145 | 364 |
| Total | 2,074 | 2,280 | 2,120 | 2,669 | 2,585 | 2,309 |
| Burley: | | | | | | |
| United Kingdom | 323 | 636 | 534 | 558 | 418 | 843 |
| Belgian Congo | 5 | 22 | 21 | 31 | 17 | 392 |
| Egypt | 274 | 259 | 98 | 386 | 362 | 232 |
| Australia | - | - | - | 10 | 10 | - |
| Other Countries | - | 8 | - | 9 | 18 | 22 |
| Total | 602 | 925 | 653 | 994 | 825 | 1,489 |
| Stems and Scraps: | | | | | | |
| United Kingdom | 45 | 6 | 17 | 25 | 12 | 36 |
| Netherlands | 51 | - | - | 49 | 17 | 16 |
| Sweden | - | - | - | 15 | 578 | 554 |
| Belgian Congo | 50 | 123 | 26 | 231 | 76 | 75 |
| Canary Islands | - | - | - | 54 | 37 | 20 |
| Denmark | 30 | - | 111 | 53 | 55 | - |
| Belgium | - | - | 54 | 11 | - | 3 |
| Other Countries | 32 | 50 | 81 | 67 | 32 | 69 |
| Total | 208 | 179 | 289 | 505 | 807 | 773 |
| Total Unmanufactured Tobacco Including Stems & Scraps: | | | | | | |
| United Kingdom | 14,119 | 17,987 | 14,790 | 15,866 | 10,371 | 13,955 |
| Sierra Leone | 1,214 | 1,479 | 1,146 | 1,405 | 1,539 | 1,826 |
| Egypt | 1,982 | 839 | 2,866 | 2,370 | 1,759 | 1,780 |
| Belgian Congo | 1,411 | 2,814 | 2,705 | 4,551 | 2,033 | 3,377 |
| Netherlands | 1,166 | 470 | 229 | 451 | 1,168 | 1,225 |
| Canary Islands | 698 | - | 188 | 806 | 188 | 952 |
| Denmark | 493 | 333 | 306 | 81 | 174 | 45 |
| Australia | - | - | 10 | 30 | 29 | 10 |
| Sweden | 255 | 742 | 166 | 374 | 878 | 753 |
| Belgium | 107 | 26 | 621 | 139 | 137 | 171 |
| Other Countries | 2 401 | 799 | 1,328 | 1,208 | 2,263 | 2,161 |
| Total | 23,346 | 25,489 | 24,355 | 27,281 | 20,539 | 26,255 |

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## Dark Sun-Cured

Dark sun-cured is used mainly for smoking and chewing tobacco. The dark sun-cured harvested in 1954 is estimated at 5.2 million pounds. This is somewhat less than output in 1951 and 1953, but well above the level of other years.

The same variety (Western) is used for sun-cured as for fire-cured with only the method of curing differing. The demand and production for this kind of leaf is expanding and further increases are likely.

Over two-thirds of the total production in Nyasaland is in the Lilongwe Area of the Central Province, with practically all of the remainder in an area between Golomoti and Balaka in the Southern part of the Central province.

Most of the production is on estates, but about one million pounds is grown on Native Trust land. The average yield is usually about 200 pounds per acre on Native Trust land and 400 to 500 pounds per acre on estates.

Production of tobacco by the natives is in competition with peanuts, corn and cotton in some areas. These crops require less labor per unit of production and yields of these crops are rising; whereas, there is considerable difficulty in maintaining the yields of sun-cured leaf. Sun-cured is produced about the same as is fire-cured, except in regard to curing.

## Prices - Sun-Cured

For many years the average auction prices of sun-cured were about the same as those for fire-cured; however, since 1947 with the exception of 1952, the prices of sun-cured have been considerably higher. Part of the difference is due to the better quality of sun-cured grown on estates. Sales of 2.52 million pounds through July 10th of the 1954 marketing season averaged 17.35 pence (20.24 U.S. cents) per pound on Limbe auctions. With the present shift in demand, prices seem likely to remain in favor of sun-cured as compared to fire-cured.

## Exports

In the last 3 years the United Kingdom has taken 85 percent of total exports with the Belgian Congo importing most of the remainder.

## Flue-Cured

All flue-cured is produced on European Estates. Most of it is produced in three areas, but small experimental plantings have been made in several localities. One area is located just East of Limbe and extends from Cholo to Zomba. Another area centers around Fort Mengachi which is Southeast of Lake Nyasa, and only a short distance East of Fort Johnson. Kasungu is the center of the other area and production has only recently been started there. The first two areas are in the Southern Province and the latter is in the Central Province. Soils are well adapted for flue-cured production in the Fort Manning area, which is near Fort Jameson, Northern Rhodesia. It is reported that some plantings have been made in the Northern Province and that satisfactory quality leaf can be produced there.

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The flue-cured crop harvested in 1954 is estimated at 3.85 million pounds, surpassed only by output in 1951. Production reached about 3.5 million pounds as early as 1932, but declined sharply in 1933, remaining at about 2.2 million until 1939. Production increased to 3.1 million in 1939, 3.3 million in 1940 and 3.6 million in 1941, then fell again to lower levels and remained at about 2.3 million pounds for several years. It has risen gradually in recent years, especially in the Kasungu area.

### Specified Production Costs

Production practices are about the same as in Southern and Northern Rhodesia; however, native wage rates are somewhat lower in Nyasaland as this is a labor surplus area. The usual rate per adult male worker on tobacco farms is 30 shillings ($4.20 U.S. equivalent) cash per month with eight pounds of meat and 56 pounds of corn meal furnished per month. The total wage (cash plus perquisites) is equivalent to about $9.50 to $10.00 U.S. currency per month per adult native male.

The prices of fertilizer and manufactured goods are considerably higher than in Southern Rhodesia, largely due to increased freight rates for the longer distances that these products are transported.

### Quality, Use, and Price

Flue-cured leaf is a good bright color and has a pleasant aroma; however, some buyers claim that it has a very distinctive flavor, which limits its use in cigarettes. The author was unable to secure evidence to either prove or disprove this claim. Most of the Nyasaland flue-cured is reported as used in smoking and chewing tobacco rather than in cigarettes. However, there are no readily available data on this subject.

Auction prices rose sharply in 1950 and 1951 for an average 34.1 and 35.3 cents per pound respectively, but declined to 25.4 and 30.9 cents in 1952 and 1953. The 3.1 million pounds sold at Limbe auctions in the period April 27 - July 10, 1954 brought an average of 30.41 pence (35.48 U.S. cents) per pound.

### Exports - Flue-Cured

The principal country of destination of this leaf is the United Kingdom. In the past 6 years (1948-53) approximately 80 percent of the total exports of flue-cured has gone to the U. K. The remainder of the crop is exported to a number of countries, which varies considerably from year to year. In the last 2 years the Netherlands, Belgian Congo, British West Indies, Sweden, Belgium, Germany and French Equitorial Africa have purchased most of the leaf not purchased by the U. K.

### Burley

About 1.8 million pounds are estimated as harvested in 1954. This is slightly higher than that harvested in 1953, and well above the levels of previous years.

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Burley is produced in the Lilongwe Area and is a heavy red type. It is used primarily for smoking and chewing tobacco. Practically all Burley is produced on European estates. Burley leaves are primed or cropped in the field rather than stalk-cut as in the United States.

### Prices Received for Burley

Over the past 5 years prices received for Burley have ranged between 26.6 and 31.1 U.S. cents per pound. These are considerably above the prices received for fire-cured and sun-cured and only 10 to 15 percent below those received for flue-cured. Actually in 1949 and 1952 the average prices received for Burley were slightly higher than for flue-cured. The 1.2 million pounds of Burley sold through July 10th of the 1954 marketing season averaged 28.5 pence (equivalent to 33.2 U.S. cents) per pound. With improved practices and yields, these prices are sufficient to expand output on the basis of current production costs. Output is likely to expand somewhat, but demand may be an important limiting factor.

### Exports of Burley

In the last 3 years the United Kingdom has taken 85 percent of total exports. The Belgian Congo has taken most of the remainder.

### Marketing

There are two modern auction warehouses in Limbe and the leaf tobacco is handled in bales as in Southern and Northern Rhodesia. All tobacco on Native Trust land is produced under the direction of and purchased by the African Tobacco Board. The Board grades and bales the leaf and sells it on the Limbe auctions. The natives are paid when the tobacco is delivered to the Board on the basis of prices by grades established earlier by the Board. The Board makes a profit from these operations and this money is used for a Native Development and Welfare Fund. The funds are used for building shelters, welfare halls, roads and wells, for crocodile destruction, crop protection, land settlement schemes and soil erosion control. Some of the surplus may be used as a stabilization fund to increase the incomes of native tobacco growers in years when tobacco prices are low.

There are about 40 tobacco collection points established throughout the producing areas, located in such a manner as to reduce the distances that natives carry the tobacco to market.

It is sometimes difficult to get enough buyers interested in purchasing flue-cured and Burley, to attend Nyasaland markets. With relatively little competition among buyers for the purchases of certain kinds and grades of leaf, the level of prices for these types may be determined largely by the actions of a few companies.

There are adequate local redrying facilities. Most of the leaf is exported in 210-pound bales or in boxes and hogsheads containing approximately 400 pounds of leaf. Most of the exports move by rail from Limbe, Nyasaland to Beira, Mozambique, where they are put aboard ships. Freight costs to Beira are relatively high.

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Average Prices Received on Auction by Kind of Tobacco - Nyasaland - 1938-53

| Period 1/ | Fire-Cured | | Sun-Air-Cured | | Flue-Cured | | Burley | |
|---|---|---|---|---|---|---|---|---|
| | Pence | U. S. Cents 2/ | Pence | U. S. Cents 2/ | Pence | U. S. Cents 2/ | Pence | U. S. Cents 2/ |
| Average: | | | | | | | | |
| 1938-39 | 3.87 | 4.5 | 4.84 | 5.6 | 6.96 | 8.1 | 3/ | 3/ |
| 1940-44 | 7.09 | 8.3 | 7.06 | 8.2 | 9.59 | 11.2 | 3/ | 3/ |
| 1945 | 5.89 | 6.9 | 7.41 | 8.6 | 12.03 | 14.0 | 3/ | 3/ |
| 1946 | 14.69 | 17.1 | 15.29 | 17.8 | 22.04 | 25.7 | 3/ | 3/ |
| 1947 | 9.94 | 11.6 | 9.74 | 11.4 | 22.80 | 26.6 | 3/ | 3/ |
| 1948 | 15.69 | 18.3 | 20.25 | 23.6 | 25.96 | 30.3 | 22.88 | 26.68 |
| 1949 | 20.11 | 23.5 | 29.61 | 34.5 | 25.86 | 30.1 | 26.68 | 31.1 |
| 1950 | 15.69 | 18.3 | 19.35 | 22.6 | 29.27 | 34.1 | 24.64 | 28.7 |
| 1951 | 11.62 | 13.6 | 16.07 | 18.7 | 30.32 | 35.3 | 22.83 | 26.6 |
| 1952 | 16.57 | 19.3 | 16.56 | 19.3 | 21.76 | 25.4 | 23.50 | 27.4 |
| 1953 | 14.04 | 16.4 | 16.52 | 19.3 | 26.46 | 30.9 | 22.89 | 26.7 |
| 1954 4/ | 15.19 | 17.7 | 17.35 | 20.2 | 30.41 | 35.5 | 28.50 | 33.2 |

1/ Year marketed. 2/ Converted on the basis of $2.80 U.S. currency equivalent to one Rhodesian pound. 3/ Burley sales, if any, included with those of sun-air-cured leaf prior to 1948. 4/ Sales through July 10, 1954.

### Local Tobacco Manufacturing Industry

All the cigarettes produced locally are manufactured by one company. There are 3 important brands of flue-cured cigarettes -- one retails for 28 U. S. cents per pack of 50, and the other two retail for 35 U.S. cents per pack of 50. A strong dark fire-cured cigarette manufactured for consumption by the natives retails for one penny per pack of eight cigarettes. Limited quantities of Virginia-type cigarettes manufactured in the United Kingdom are consumed by the non-native population.

### Taxes, Import and Export Duties

There is an import duty of 17 shillings 6 pence (equivalent to $2.45 U.S. currency) per pound of cigarettes. This is equivalent to about 31 U.S. cents per pack of 50 cigarettes. There is a duty of 12 shillings (equivalent to $1.68 U.S. cents) per pound on imported cut tobacco.

On cigarettes manufactured locally, there is a 5 pence (5.83 U.S. cents excise tax per pack of 50 cigarettes of the light types for consumption by whites and a one-tenth penny tax per pack of 8 cigarettes of the dark type sold to natives.

There are cesses (land taxes) of 1.5 pence (1.8 U.S. cents) per 100 pounds or part thereof of unmanufactured tobacco produced locally. There have been export taxes of 2 pence (2.3 U.S. cents) per pound on unmanufactured leaf tobacco and 3 pence (3.5 U.S. cents) per pound of unmanufactured strip exported, but the export taxes have been eliminated from all tobacco sold for export after January 1, 1954.

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT 37-54 September 28, 1954

# GREATER COMPETITION EXPECTED FROM CANADIAN TOBACCO AS THE ESTIMATED 1954 PRODUCTION ESTABLISHES A RECORD LEVEL

By James W. Birkhead 1/

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## Summary

Increasing production of tobacco in Canada is offering greater competition to United States exports. Canadian exporters have two important advantages as compared to U. S. tobacco exporters -- namely, a 21.7 cents per pound lower import duty in the United Kingdom, and somewhat lower prices paid for Canadian leaf. The expected output for all kinds of tobacco this year is 159 million pounds (farm sales weight) of which 150 million is flue-cured -- both all-time highs for Canadian production. The degree of competition can be expected to increase as Canadian output continues to expand.

This year, farmers were permitted to grow their entire "base acreage" of flue-cured. The area devoted to flue-cured in 1954 is estimated at 122,275 acres as compared to the previous high of 111,300 acres in 1951 and 95,800 in 1953. The output of flue-cured, according to the latest available estimate of August 10, is expected to be 150 million pounds or 18 million more than in 1953. From observations made by the author, it appears that these estimates of production may be lower than the actual outturn as very rapid growth occurred after rains in the first week of August.

Canadian exports of flue-cured have increased greatly in recent years, even though domestic consumption in the form of cigarettes has also been rising rapidly.

The increased output of Canadian flue-cured tobacco will offer more competition to U. S. leaf, particularly in the U. K., West Indies and Australia, as well as in certain other areas.

Canadian flue-cured is heavier-bodied than is U. S. leaf. It is of good quality, has a bright color, and has distinctive characteristics of its own, differing significantly from U. S. leaf in regard to both aroma and flavor. However, regardless of the distinctive characteristics of Canadian leaf, it is well liked by members of the U. K. tobacco industry as well as by the tobacco trade in other countries.

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1/ Mr. Birkhead, Tobacco Specialist, Foreign Agricultural Service, has just returned from a trip through the tobacco producing areas of Canada. A more comprehensive report on Canadian tobacco production and trade will be published later.

## Preferential U. K. Import Duty

Canadian leaf enjoys a one shilling, six and one-half pence (equivalent to 21.58 U. S. cents) per pound lower import duty than does U. S. leaf sold in the U. K. Also, Canadian flue-cured leaf prices are somewhat lower than U. S. prices although there is also a difference in quality. In 1953 farmers received an average price equivalent to 46.45 U. S. cents per pound (including 2 cents per pound for grading and tying) for Canadian flue-cured as compared to 52.7 for U. S. leaf. The lower duty preference in the U. K. and the lower basic price of leaf greatly influence the competitive position of Canadian leaf.

There is a large area of adapted soils. Average yields are likely to rise as the use of supplemental irrigation is expanding rapidly. These together with the current levels of profits made from flue-cured tobacco production indicate that the potential for increasing output is great. Labor is ample with the output per hour of work unusually high as compared to other tobacco producing areas. Many immigrants, particularly from Germany, Belgium and Holland are attracted to tobacco production and are finding the growing of flue-cured in Southern Ontario very profitable. One of the most important controlling factors in regard to increasing production relates to the problem of expanding export outlets. Canada, to a large extent, encounters many of the same difficulties in regard to expanding exports as does the U. S. -- namely, lack of dollars by the importing countries. However, as a member of the British Commonwealth of Nations, Canada has a big advantage in those markets due to the preferential duty rate on imports from countries within the Commonwealth.

The allocation of dollars made by the U. K. Government for purchases of tobacco by the U. K. tobacco industry is made in such a way that dollars may be used in either the U. S. or Canada. With the cost to the U. K. purchaser lower for Canadian tobacco, as compared to U. S. leaf, there is likely to be increasing pressure to spend a higher proportion of the dollars allocated for Canadian leaf.

Harvest of the 1954 flue-cured crop started in Southern Ontario about August 23 and was in full swing by the end of the last week of August. A report from Ottawa on September 8 indicates that cool rainy weather continues to delay the ripening and harvest of tobacco. The tobacco being harvested at that time did not appear quite ripe by U. S. standards. Also, the taste of Canadian cigarettes have a distinctive flavor which appears to indicate the use of unripe tobacco, but Canadians apparently do not object to this taste.

One must conclude that due to the lower duty on Canadian tobacco shipped to the U. K., lower prices paid for Canadian leaf, efficient production and present level of profits derived from the current cost-price relationship in producing flue-cured leaf, that output and exports can be expected to rise sharply unless some effective means can be found for offsetting the lower import duty now enjoyed by Canadian leaf in U. K. markets and perhaps to some extent the price advantage as compared to U. S. leaf.

CANADA: Production of tobacco by kind, averages 1935-39, 1940-44, 1945-49, annual 1950-54 - farm sales weight

| Year | Flue-Cured | Burley | Cigar | Other 1/ | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Average: | | | | | |
| 1935-39 | 54,616 | 10,749 | 5,102 | 6,089 | 76,556 |
| 1940-44 | 66,916 | 10,164 | 3,644 | 3,760 | 84,484 |
| 1945-49 | 100,071 | 12,664 | 4,914 | 3,724 | 121,373 |
| Annual: | | | | | |
| 1950 | 108,202 | 5,660 | 4,175 | 2,261 | 120,298 |
| 1951 | 144,055 | 3,609 | 3,728 | 2,400 | 153,792 |
| 1952 | 131,965 | 2,352 | 2,639 | 2,763 | 139,719 |
| 1953 | 132,352 | 1,709 | 3,830 | 1,299 | 139,190 |
| 1954 2/ | 150,000 | 3,600 | 4,000 | 1,420 | 159,020 |

1/ Mostly pipe tobacco. 2/ Preliminary estimate made about August 10.
Source: Dominion Bureau of Statistics, Canada, and report from U. S. Foreign Service Officer.

CANADA: Exports of flue-cured tobacco by country of destination, averages 1940-44 and 1945-49, annual 1950-53 - export weight

| Country | Average | | | | | |
|---|---|---|---|---|---|---|
| | 1940-44 | 1945-49 | 1950 | 1951 | 1952 | 1953 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United Kingdom | 6,384 | 12,557 | 14,612 | 22,593 | 30,990 | 22,244 |
| British Guiana | 123 | 183 | 211 | 170 | 207 | 203 |
| British West Indies 1/ | 1,578 | 2,174 | 1,973 | 2,217 | 2,896 | 2,753 |
| Australia | 298 | - | 224 | 1,859 | 2,785 | 1,740 |
| Belgium & Luxemburg | - | 10 | 1,217 | 617 | 113 | - |
| Netherlands | - | 3 | 866 | 520 | 294 | 252 |
| Portugal | 80 | 40 | 65 | 210 | - | 44 |
| Newfoundland 2/ | 124 | 247 | - | - | - | - |
| Other Countries | 134 | 38 | 3/ 502 | 124 | 1 | 28 |
| Total | 8,721 | 15,252 | 19,670 | 28,310 | 37,286 | 27,264 |

1/ Includes Barbados, Jamaica, Trinidad and Tobago, and the Leeward and Windward Islands.
2/ Became a province of Canada March 31, 1949.
3/ Includes 667,000 pounds to China in 1940.
Source: Dominion Bureau of Statistics, Canada, and reports from U. S. Foreign Service Officer.

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# MISCELLANEOUS TOBACCO DEVELOPMENTS

## Greece Signs Trade and Payments Agreement with Rumania

The signing of a trade and payments agreement between Greece and Rumania in May 1954 has been reported by the American Embassy at Athens.

It follows the general lines of a recent agreement between Greece and Hungary, another member of the Soviet trade bloc. In general, these agreements will facilitate the export of Greek tobacco to Soviet-dominated areas.

Greece and Rumania have assumed the obligation to aid and promote, insofar as possible, trade transactions in either direction within the framework of the import-export regulations in force at present in each country. The agreement is to remain in force until June 30, 1955 and will be considered extended if neither party formally terminates it on 90 days notice. The payments agreement provides for a credit margin of $250,000. Payment of the value of merchandise and other invisible payments by both countries will be effected in dollars through a bank clearing account.

The total Greek export quota is $3,000,000 of which tobacco is expected to account for $300,000.

## Greek First Half Tobacco Exports Lower Than Last Year

Greek tobacco exports for the first half of 1954 were slightly lower than last year. In the first half of 1954, 42.4 million pounds were exported - a drop of 5.5 million from the 47.9 million exported in January-June, 1953. Stocks of exportable tobacco on hand July 1, 1954, were 120.2 million pounds, or about 14 percent larger than the 103.6 million pounds on hand July 1, 1953. Germany was the major market for Greek tobacco during this period, taking 10.1 million pounds, or about 24 percent of the total exported. The United States took 5.3 million pounds, about 13 percent, and 4.9 million pounds, or 12 percent, were shipped to the Soviet Union.

Tobacco as an export item from Greece was mentioned prominently in a trade and payments agreement which Greece and Hungary signed June 5, 1954. These agreements are to run for one year and will be automatically extended if neither country formally terminates them. In general, the two agreements follow the pattern of similar bilateral agreements which Greece has been negotiating in recent years with other countries. The agreements set up credit and payment facilities for the exchange of many commodities under present import regulations.

## Turkey's Leaf Exports Lower in the First Half of 1954

The American Embassy at Ankara reports that exports of Turkish tobacco in the first half of 1954 were 48 percent lower than in the same period in 1953. However, exports for the year 1953 were about 44.0 million pounds higher than usual because of the disposal of large stocks of accumulated tobacco.

The United States, West Germany, United Kingdom, Egypt, Belgium and Italy all took smaller shipments during the first half of 1954 than they took in the first half of 1953. Shipments were higher to the Soviet Bloc of East Germany, Poland, Czechoslovakia and Bulgaria.

Exports of Turkish Leaf Tobacco 1/, January-June, 1953, 1954 2/

| Country of Destination | January-June 1953 | January-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| United States | 8,808 | 33,578 |
| West Germany | 5,361 | 9,427 |
| United Kingdom | 143 | 2,819 |
| Egypt | 2,285 | 6,496 |
| Belgium | 513 | 3,104 |
| Italy | 1,277 | 6,527 |
| East Germany | 3,983 | 1,519 |
| Poland | 3,812 | - |
| Czechoslovakia | 4,149 | 2,059 |
| Bulgaria | 73 | - |
| All Others | 10,113 | 12,493 |
| Total | 40,517 | 78,022 |

1/ Leaf only. 2/ Contains preliminary figures.

## German Tobacco Imports Higher in the First Half of 1954

The American Consul General at Breman reports that imports of unmanufactured tobacco into West Germany amounted to 62.1 million pounds during the first half of this year. This compares with 53.0 million during the first half of 1953. Imports from the United States rose from 22.3 million pounds in the first half of 1953 to 26.2 million pounds in the first half of 1954, an increase of about 18 percent.

Imports of Unmanufactured Tobacco into Western Germany

| First Half of Year | Total | United States | Turkey | Other |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1953 | 53,037 | 22,250 | 6,209 | 24,578 |
| 1954 | 62,081 | 26,229 | 6,508 | 29,344 |

Turkish tobacco imported into West Germany rose only 5 percent during the first semester of this year over the corresponding period in 1953. This occurred in spite of the Turkish desire to sell more tobacco to the Federal Republic in an attempt to balance their foreign trade payment account. It has been reported that German importers are having difficulty in buying desirable grades as the volume of these grades is 25 to 30 percent lower in this year's crop than in last years crop. Importers may not be able to buy as much as they bought last year and as a result average prices paid have increased about 19 percent.

It has been reported that tobacco dealers have been attempting to buy Russian oriental-type tobacco through Finland to supply grades that are at present unobtainable in Turkey.

## Iraq Tobacco Monopoly Acts to Improve the Quality of Domestic Tobacco

The Tobacco Monopoly of Iraq, in an effort to improve the quality of its domestic tobacco, has increased the prices to be paid for the better grades of leaf from the 1954 crop. Iraq produces oriental-type tobacco which, to date, has not achieved acceptance in foreign markets. The Monopoly has made efforts in the past to provide growers with high-quality seedlings and cultural information in an attempt to produce leaf more acceptable to foreign buyers. It believes that by increasing the prices for the top grades, farmers will be induced to produce tobacco that will meet export requirements.

Comparison of 1953 and 1954 Prices Paid by the Iraq Monopoly
(U. S. dollars per 100 pounds)

| Type | Grade | 1953 | 1954 |
|---|---|---|---|
| Leaf Tobacco | Special Grade | $ 35.56 | $ 44.45 |
| " | 1 A | 29.21 | 35.56 |
| " | 1 B | 29.21 | 29.21 |
| " | 2 | 26.04 | 26.67 |
| " | 3 | 19.05 | 20.32 |
| Crushed Tobacco | 1 | 21.86 | 20.32 |
| " | 2 | 17.51 | 17.78 |
| " | 3 | 10.16 | 10.16 |

Iraq Production of Unmanufactured Tobacco - Farm Sales Weight

| Period | Amount |
|---|---|
| | 1,000 pounds |
| 1945-49 | 5,864 |
| 1950 | 8,523 |
| 1951 | 10,273 |
| 1952 | 9,212 |
| 1953 | 15,878 |
| 1954 1/ | 17,637 |

1/ Preliminary

## Mexico Plans to Reduce Cigarette Imports to 15 Percent of the 1953 Level

The American Embassy at Mexico City reports that the current policy of the Mexican Government is to limit imports of cigarettes to 15 percent of the amount imported in 1953. Imports during 1953 were 249 thousand pounds and in the future the limit will be about 37 thousand pounds per year. Legal imports of U. S. cigarettes into Mexico amounted to 242 thousand pounds in 1953. These quotas are to be flexible and may be revised upward or downward as the balance of payments and other factors permit.

## Hong Kong Tobacco Imports Up Slightly in the First Half of 1954

Hong Kong imported 4.3 million pounds of unmanufactured tobacco and 2.0 million pounds of cigarettes in the first half of 1954, compared with 4.2 million pounds of unmanufactured tobacco and 1.9 million pounds of cigarettes in the first half of 1953. Imports of unmanufactured tobacco from the U. S., however, dropped from nearly 2.3 million pounds in January-June 1953 to 1.9 million pounds this year. Cigarette imports from the U. S. also dropped; the difference was made up, as in unmanufactured tobacco, by increased imports from the Sterling area, China and Macao.

HONG KONG: Imports of Unmanufactured 1/ Tobacco and Cigarettes: Jan.-June, 1953 and 1954

| Country of Origin | Unmanufactured 1/ | | Cigarettes | |
|---|---|---|---|---|
| | Jan-June 1953 | Jan-June 1954 | Jan-June 1953 | Jan-June 1954 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United Kingdom | 1,286 | 1,375 | 623 | 645 |
| United States | 2,266 | 1,930 | 1,241 | 1,141 |
| Central Africa (British) | 7 | 277 | - | 29 |
| China | 233 | 261 | - | 16 |
| Macao | 141 | 318 | 26 | 183 |
| Other | 312 | 163 | 3 | 21 |
| Total | 4,245 | 4,324 | 1,893 | 2,035 |

1/ Includes cut tobacco for further processing, stems and scraps.

## India Continues Export Promotion of Flue-Cured Tobacco

It is reported from Calcutta that the Indian Tobacco Trade Delegation to Southeast Asian countries has returned home and has indicated that China plans to buy 4.5 million pounds of Indian flue-cured tobacco which will be paid for by shipments of silk yarn, spun silk and other items to India.

Additional aid is to be given through issuance of special import licenses for commodities to be purchased by India from countries where Indian tobacco is to be sold. Commodities may be imported into India in anticipation of tobacco exports of the required value to be shipped in the next 4 months. This program applies only to the surplus low grades of flue-cured that were harvested before 1954.

## U. S. Tobacco Exports in June 1954

United States exports of unmanufactured tobacco in June 1954 totaled 26.8 million pounds valued at $17.8 million. This was 1.8 million pounds lower than in May and 21 percent below June 1953.

Exports of flue-cured tobacco were 17.9 million pounds in June compared to 24.9 million in June 1953, a 28 percent decrease. Burley, Green River, One Sucker and Cigar Binder showed substantial decreases in June, compared with the same period in 1953. All other types showed increases.

In the first 6 months of the current year, total exports of unmanufactured tobacco at 154.1 million pounds were 28 percent below the same period last year. Exports of flue-cured tobacco at 115.6 million were off 35 percent. This can be accounted for in large measure by decreased shipments to the United Kingdom (15.2 million pounds for the first 6 months of 1954 compared with 66.5 million pounds for the same period in 1953). In the first 6 months of 1953, considerable quantities of tobacco, which normally would have moved to the United Kingdom in the fall of 1952, were exported under the provisions of an option purchase arrangement. Exports of Burley, at 16.6 million pounds were 34 percent higher than a year earlier. Exports of most other types declined.

Exports of U. S. Unmanufactured Tobacco
June 1954 and January-June 1954 with Comparisons
(Export Weight)

| Type | June | | January-June | |
|---|---|---|---|---|
| | 1953 | 1954 | 1953 | 1954 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-Cured . . . . . . . . . . . | 24,922 | 17,911 | 177,197 | 115,585 |
| Burley . . . . . . . . . . . . . . | 4,997 | 3,703 | 12,450 | 16,662 |
| Virginia Fire-Cured . . . . . .. | 184 | 325 | 1,675 | 1,640 |
| Dark-Fired Kentucky-Tennessee . | 1,781 | 2,788 | 10,964 | 9,669 |
| Maryland . . . . . . . . . . . . | 458 | 938 | 3,337 | 3,760 |
| Green River . . . . . . . . . . . | 181 | 36 | 1,215 | 871 |
| One Sucker . . . . . . . . . . . | 140 | 44 | 534 | 334 |
| Cigar Wrapper. . . . . . . . . . | 427 | 453 | 2,056 | 1,539 |
| Cigar Binder . . . . . . . . . . | 125 | 53 | 1,800 | 641 |
| Cigar Filler . . . . . . . . . . | 3 | 3 | 178 | 158 |
| Other . . . . . . . . . . . . . .. | 303 | 530 | 2,785 | 3,203 |
| Total . . . . . . . . . . | 33,521 | 26,784 | 214,191 | 154,062 |
| Declared value,million dollars | 20.2 | 17.8 | 138.5 | 98.4 |

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.

Exports of tobacco products, valued at $5.3 million, were higher in June 1954 than in the same month last year. All products, with the exception of smoking tobacco, showed increases.

Exports of cigarettes and smoking tobacco were lower in the January-June 1954 period than in the same period a year ago. Exports of all other tobacco products were higher than in 1953.

Exports of U. S. Tobacco Products June 1954 with Comparisons

| Class of Products | June | | January-June | |
|---|---|---|---|---|
| | 1953 | 1954 | 1953 | 1954 |
| Cigars and Cheroots (1,000 pieces) | 555 | 791 | 2,704 | 4,659 |
| Cigarettes (1,000 pieces) | 1,119,298 | 1,310,409 | 8,398,874 | 7,773,461 |
| Chewing Tobacco and Snuff (1,000 pieces) | 82 | 126 | 599 | 804 |
| Smoking Tobacco in Packages (1,000 pounds) | 49 | 43 | 333 | 294 |
| Smoking Tobacco in Bulk (1,000 pounds) | 465 | 218 | 1,965 | 1,799 |
| Declared Value (million dollars) | 4.7 | 5.3 | 32.2 | 31.1 |

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

## Sales of Tobacco Products by the French Monopoly Increase in 1953

Sales of tobacco products by the French Monopoly increased during 1953. Cigarettes accounted for most of the increase with a small rise in cigarillos and cut tobacco. Sales of cigars, chewing tobacco and snuff declined slightly.

Sales of Tobacco Products by the French Monopoly (Including Imported Products and Sales Abroad) in 1952 and 1953

| | 1952<br>1,000 pounds | 1953<br>1,000 pounds |
|---|---|---|
| Cigarettes | 83,158 | 85,382 |
| Cigarillos | 419 | 505 |
| Cigars | 930 | 890 |
| Cut Tobacco | 40,596 | 40,847 |
| Chewing Tobacco | 1,265 | 1,182 |
| Snuff | 1,543 | 1,446 |
| Total | 127,911 | 130,252 |

Out of a total of 40.8 million pounds of unmanufactured tobacco imported by France in the first half of 1954, 3.0 million pounds came from the United States. In the first half of 1953, 27.6 million pounds were imported, of which 4.7 million pounds were supplied by the United States.

## New Cigarette Factory in Gold Coast

A new cigarette factory began producing cigarettes at Takoradi, Gold Coast, in April 1954. In June, production reached 1 million cigarettes and it is expected that by October of this year monthly production will be around 2 million pieces. Only one brand of cigarettes is being made at present, and the leaf used is imported from neighboring Nigeria. A small quantity of locally-produced tobacco is also used. Plans are being made to manufacture another brand of cigarettes later this year.

The new company has established nurseries in the Gold Coast to stimulate tobacco production by African farmers. Seedling tobacco plants grown at the company nurseries are given free of charge to growers for transplanting. If local production develops as desired by the company, a redrying plant may be constructed to be ready for operation in about 3 years.

## U. K. Tobacco Imports First Half, 1954

The United Kingdom imported 81.8 million pounds of unmanufactured tobacco in the first half of 1954. This was 31 percent below the 117.9 million pounds imported in the first half of 1953. Imports of flue-cured tobacco were lower - 67.3 million pounds in the first half of this year compared with 106.7 million pounds in the corresponding period last year. Imports of other types of unmanufactured tobacco increased from 11.2 million pounds in the first half of 1953 to 14.5 million pounds in the first half of this year.

The United Kingdom continues to process most of the tobacco products used within the country. In the first half of 1954, tobacco manufactures imported were only 211,000 pounds out of total imports of unmanufactured tobacco and products of 81.8 million pounds. Cigars made up nearly half, by weight, of the tobacco products imported.

UNITED KINGDOM: Imports of tobacco and tobacco manufactures 1/
January-June 1953 and 1954

| Country of Origin | January-June 1953 | Percent of Total | January-June 1954 | Percent of Total |
|---|---|---|---|---|
| | 1,000 pounds | Percent | 1,000 pounds | Percent |
| Southern Rhodesia | 12,301 | 10.4 | 10,780 | 13.1 |
| Nyasaland | 567 | 0.5 | 2,990 | 3.6 |
| India | 13,450 | 11.4 | 16,074 | 19.6 |
| Canada | 10,494 | 8.9 | 18,760 | 22.9 |
| Netherlands | 4,934 | 4.2 | 4,520 | 5.5 |
| Greece | 632 | 0.5 | 846 | 1.0 |
| Turkey | 764 | 0.6 | 541 | 0.7 |
| United States 2/ | 72,990 | 61.8 | 25,096 | 30.6 |
| All Others | 2,032 | 1.7 | 2,441 | 3.0 |
| Total | 118,164 | 100.0 | 82,048 | 100.0 |

1/ Includes a small amount of manufactured tobacco -- 249,000 pounds in the first half of 1953 and 211,000 in the first half of 1954.
2/ Most of the imports from the United States are flue-cured tobacco.

The large drop in imports of unmanufactured United States tobacco from 73.0 million pounds in the first half of 1953 to 25.1 million pounds in the first half of 1954, was a result of delayed shipments from the 1952 crop. A considerable quantity of tobacco from the 1952 crop was held under an option purchase agreement and was not shipped until the spring of 1953.

## Venezuelan Tobacco Manufacturers and Producers Reach an Agreement

The American Embassy at Caracas reports that one of the large cigarette manufacturers in Venezuela has reached an agreement with the Growers Association. The Company is trying to withdraw from the financing of tobacco production by its contract growers. However, it will advance fertilizer, insecticides, seed, wrappings and ties. The Company also agrees to purchase the entire crop at a set price. These contracts are to enable the growers to obtain bank credit. There will be a small increase in price partially to pay the added cost of credit. One very important problem has been solved by the agreement, namely, the establishment of standard grades, permitting disputes to be settled to the satisfaction of both the Company and the growers.

## NEW MAILING LIST

## FOREIGN DISPOSAL OF FARM COMMODITIES

The Foreign Agricultural Service is establishing an informational list as a service for United States agricultural trade interests who need to keep currently informed regarding the operation of the new farm commodity foreign disposal program under Title I, Public Law 480.

This mailing list (code designation FAS-FSD) will be used for distribution from time to time of press releases, administrative announcements, regulations, progress reports and miscellaneous news about the disposal program. Such material will be of special interest to persons and groups engaged in agricultural export activities.

Individuals and organizations in the United States requesting information will receive it without cost. Requests should be addressed to the Foreign Agricultural Service, U. S. Department of Agriculture, Washington 25, D. C. For convenience, this page, with address blanks below filled in, may be torn off and mailed in to indicate your desire to be placed on the FAS-FSD list.

Name ______________________________ Street or RFD __________________________

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FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FT 39-54 October 29, 1954

# RESULTS OF TESTS ON FLUE-CURED TOBACCO IN THE GOLD COAST AND CYPRUS, AND BURLEY GROWN IN CYPRUS

Because of the interest of the U. S. tobacco trade in the prospects of increasing competition from other producing areas, the following results of tobacco trials in Gold Coast and Cyprus are reproduced from a British report entitled the "Colonial Plant and Animal Products," (Quarterly Journal of the Colonial Products Laboratory) Volume IV, Number 2, 1954.

## Flue-Cured Tobacco From the Gold Coast

The nine samples of tobacco which form the subject of this report were forwarded to the Colonial Products Laboratory by the Director of Agriculture, Gold Coast. They were stated to represent the first tobacco to be flue-cured in that country, and to have been grown by the Gonja Development Company in the Northern Territories on sandy loam soils, moderately well drained and of low fertility status. The variety was stated to be "Harrison Special".

A chemical analysis and opinion on the smoking properties and general quality in comparison with Rhodesian and American tobacco were requested, together with suggestions as to improvements in the cultural or curing treatment.

The results show a normal composition for flue-cured cigarette tobacco, in that the nitrogen and nicotine are not too high. The ash composition, with high potash and low chloride and sulphate, indicates good burning properties. The chloride, which is the most objectionable constituent as regards burning quality, is unusually low. The magnesia content is adequate.

## Smoking Trials

The leaf held fire well and burned evenly, leaving a compact greyish ash. All the samples were mild and lacking in taste and aroma. No marked difference was noticeable between the grades.

## Commercial Opinion

The leaf was definitely not up to the standard expected by the United Kingdom market, and would not compete with the supplies of American, Rhodesian and Indian tobacco now available, particularly as the dollar allowance now permits a larger import of the American type.

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## Conclusions

The tobacco is of normal composition for a cigarette tobacco, but the leaf lacks body. This could possibly be improved if the humus of the soil could be built up by some form of manuring.

For cigarette-making a bright or semi-bright leaf is required, and this type of leaf can only be obtained by efficient flue-curing. In this respect grades I and II are good, although, with more experience, it is possible that the color of the leaf might be improved. In other respects, i.e. size of leaf, body and smoking qualities, the present samples are inferior to the American and Rhodesian leaf preferred by the trade in the United Kingdom. The nicotine content is normal for leaf used in the production of the popular blends of English cigarettes.

It is obvious that there is little prospect for this type of tobacco on the United Kingdom market under present conditions.

## Burley and Virginia Tobacco From Cyprus

The three samples of tobacco which form the subject of this report were sent to the Colonial Products Laboratory by the Director of Agriculture, Cyprus. An examination and report on their quality in comparison with previous samples were requested. (These samples were from the areas indicated below:)

(1) Burley Tobacco. Yialousa 1953.
(2) Virginia Tobacco. Irrigated. Vassili Village 1953.
(3) Virginia Tobacco. Unirrigated. Vassili Village 1953.

## Results of Examination

The composition of the Burley leaf is normal except that nicotine is rather lower than is generally found in this type.

The variety of Virginian leaf is not stated, but the composition appears to be satisfactory for an ordinary cigarette type. The nicotine and nitrogen are not unduly high, and the high sugar content indicates a good cure. The ash of both Virginian leaf samples contain a large amount of sulphate and chloride, and only a moderate amount of potash so that it was not to be expected that the combustion would be good.

## Smoking Trials

Burley.
Combustion very poor and uneven. Ash grey-black, mostly black. Flavor mild, but rather bitter.

Virginia Irrigated.
Combustion rather slow. Ash grey with some black. Flavor rather harsh and bitter.

Virginia Unirrigated.
Combustion rather better than the Virginian Irrigated. Ash grey and compact. Flavor mild and fairly good.

## Commercial Valuation

The quality of the leaves and their prospects on the United Kingdom market were discussed with a representative of a well-known tobacco firm.

The two samples of Virginian leaf were considered to be of good color, the unirrigated sample being slightly brighter than the irrigated. The leaves are on the small side. Trial cigarettes were found to give a very neutral smoke, although the unirrigated leaf had perhaps a slight tang. The unirrigated leaf also possessed slightly more body.

The leaves of the Burley sample were judged to be rather small. The smoking quality was very poor, giving a very dark ash.

It was considered that there was no possibility of this type of leaf finding a place on the United Kingdom market, particularly as the dollar allowance has been increased. A decline in the demand for Indian tobacco had already been noted.

## Conclusions

The Burley leaf is of normal composition as regards the organic constituents, but the leaves are rather small and the smoking quality is very poor.

The Virginian leaf is of good appearance, and seems to have been well flue-cured, but the smoke is not attractive. If all other conditions were comparable, no apparent advantage has been gained by irrigating.

The samples are of rather better appearance than the previous Virginian types (produced in this area), but it is evident that these tobaccos would have no value on the United Kingdom market.

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# TOBACCO PRODUCTION AND TRADE OF CANADA

By

James W. Birkhead [1]

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Preface:

This is primarily a report on the influence of production and exports of Canadian leaf on foreign outlets for U. S. tobacco. About 95 percent of Canadian output is flue-cured so most of this study is devoted to a discussion of this kind of leaf.

Because of the scale of operations and the potential for future expansion of flue-cured in Canada, the last section, "Production Operations on a Typical Southern Ontario Flue-Cured Tobacco Farm," is included in order to furnish considerable detail as to the production set-up for those who are interested in analytical data as a basis for comparing Canadian production methods and costs with those of the U. S. and other areas.

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[1] Mr. Birkhead of the Tobacco Division, Foreign Agricultural Service, made a short study of the major tobacco producing areas of Canada in the latter part of August and early September.

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## Summary

Increasing production of flue-cured tobacco in Canada is offering greater competition to United States exports and the degree of competition can be expected to increase as output of flue-cured continues to expand. Canadian exporters have two important advantages as compared to U. S. tobacco exporters - namely, a 21.6 cents per pound lower import duty in the United Kingdom, and somewhat lower prices paid for Canadian leaf. The expected output for all kinds of tobacco this year is 178.5 million pounds (farm sales weight) of which 168.4 million is flue-cured - - both all-time highs for Canada.

About 95 percent of total production is flue-cured, but some Burley, cigar, Greenriver, dark fire-cured and other miscellaneous types are grown. The potential for increasing output, particularly of flue-cured, is great with production depending chiefly on finding markets for the supplies that are not needed by domestic manufacturers. There are wide areas of adapted soils where climate is suitable and adequate labor is available. However, hail is frequent in part of the present major producing area.

Exports have been increasing rapidly in recent years and it seems likely that this trend will continue. Flue-cured accounts for most of the tobacco exports with the United Kingdom, British West Indies, Australia, Netherlands, and British Guiana being the leading foreign customers. Significant quantities of Burley, dark leaf and miscellaneous types are also shipped to the United Kingdom with smaller amounts going to the British West Indies and Belgium.

Tobacco acreage controls and minimum price guarantees are handled by private marketing associations and cooperatives which are encouraged by Dominion and provincial legislation, programs and officials through various forms of assistance and guidance.

There is no auction system for selling and purchasing tobacco, as buyers purchase directly from the farmers, although the marketing association has certain grading and minimum price support responsibilities.

## Acreage Controls and Minimum Price Guarantee Programs

There is a privately chartered organization, the Ontario Flue-Cured Tobacco Marketing Association, composed of equal number of representatives of the growers and buyers, which administer the acreage controls as well as the program of guaranteed minimum prices for flue-cured production in Ontario.

The over-all acreage permitted is based on the market outlook and the acreages assigned to individual growers are computed on a percentage basis of the "tobacco acreage base" previously determined for each particular farm. This "tobacco acreage base" is reportedly one-half of the acreage of the soil types that are suitable for producing flue-cured tobacco. An inspector from the Marketing Association determines the area of soils adapted for tobacco production. The penalty for association members, who produce more than the allotted acreage, and for all non-members is that agreement has been secured among the buyers that they will not purchase any "outside" tobacco until all of the "allotment" leaf of association members is sold. Specified dates are established prior to which no "non-allotment" tobacco is to be purchased. There is no price penalty for tobacco of non-members or on sales of excess leaf of members who produce more than the allotted acreage with the price received depending on demand-supply situation after all "allotment production" has been sold. A new producer is admitted to the Association only after his farm is fully equipped to produce tobacco and his application for admission has been approved by a vote of the association members. No new producers have been admitted since 1951, although many persons would like to become members. Some persons, who would like to grow flue-cured tobacco, have filed complaints as to the procedures and policies of the "controls" administered by the Ontario Flue-Cured Tobacco Marketing Association. These cases are shortly to be investigated under the Dominion Combines and Investigations Act.

There is a "Laurentien Tobacco Cooperative" that operates the flue-cured acreage and price guarantee programs in Quebec Province. Also, there is an "Ontario Burley Marketing Association," which handles the programs for Burley in Ontario. The cooperatives in St. Jacques and St. Cesaire control cigar leaf production in Quebec Province. These associations and cooperatives are encouraged and given assistance by the Dominion and provincial farm products marketing boards and specialists in other Government agencies in carrying out the intent of legislative provisions embodied in Dominion as well as Provincial Farm Products Marketing Acts. Marketing schemes of local grower groups of various commodities including tobacco may be certified by the Dominion authorities, if the products enter into interprovincial or export trade.

Representatives of the Dominion Department of Agriculture assist these Tobacco Marketing Associations and Cooperatives in expanding foreign sales as well as in connection with various problems relative to domestic production and trade; so, while these associations are organized under private charters, in effect, they operate to a large extent as "unofficial bodies" of the Dominion and provincial Governments.

Canada: Production of unmanufactured tobacco by kind, averages 1934-1948, annual 1949-53, farm sales weight

| Year | Flue-Cured | Burley | Dark 1/ | Cigar | Other | Total |
|---|---|---|---|---|---|---|
| Average: | | | Million Pounds | | | |
| 1934-38 | 43.0 | 9.3 | 2.5 | 4.5 | 3.5 | 62.8 |
| 1939-43 | 65.5 | 10.8 | 2.2 | 4.1 | 2.3 | 84.9 |
| 1944-48 | 94.1 | 12.0 | 1.8 | 4.8 | 1.8 | 114.5 |
| Annual: | | | | | | |
| 1949 | 116.7 | 15.5 | 2.1 | 3.7 | 1.8 | 139.8 |
| 1950 | 108.2 | 5.7 | .8 | 4.5 | 1.1 | 120.3 |
| 1951 | 144.1 | 3.6 | 1.3 | 3.7 | 1.1 | 153.8 |
| 1952 | 132.0 | 2.3 | 1.4 | 2.7 | 1.3 | 139.7 |
| 1953 | 132.4 | 1.8 | .2 | 3.4 | 1.1 | 138.9 |
| 1954 2/ | 168.4 | 4.2 | 3/ | 4.3 | 1.1 | 3/ |

1/ Greenriver and dark fire-cured. 2/ Preliminary.
3/ Not readily available.

Canada: Acreage of tobacco by kind, averages 1934-48, annual 1949-53

| Year | Flue-Cured | Burley | Dark 1/ | Cigar | Other | Total |
|---|---|---|---|---|---|---|
| | 1,000 Acres | | | | | |
| Average: | | | | | | |
| 1934-38 | 41.7 | 7.7 | 2.3 | 4.1 | 3.3 | 59.1 |
| 1939-43 | 59.6 | 8.5 | 1.6 | 3.8 | 2.6 | 76.1 |
| 1944-48 | 87.4 | 10.7 | 1.6 | 4.1 | 1.8 | 105.6 |
| Annual: | | | | | | |
| 1949 | 90.7 | 11.4 | 1.5 | 3.6 | 1.9 | 109.1 |
| 1950 | 92.1 | 4.7 | .6 | 3.2 | 1.2 | 101.8 |
| 1951 | 111.3 | 2.5 | 1.0 | 3.0 | 1.2 | 119.0 |
| 1952 | 86.0 | 1.4 | .9 | 2.2 | 1.1 | 91.6 |
| 1953 | 95.8 | 1.1 | .1 | 3.0 | 1.1 | 101.1 |
| 1954 2/ | 121.4 | 3.1 | 3/ | 5.1 | 2.1 | 3/ |

1/ Greenriver and dark fire-cured. 2/ Preliminary. 3/ Not Available.
Source: Quarterly Stocks and Consumption of Unmanufactured Tobacco, Dominion Bureau of Statistics, Canada, March 1954.

Canada: Production of unmanufactured tobacco by kind by provinces, 1950-54, farm sales weight

| Provinces | 1950 | 1951 | 1952 | 1953 | 1954 |
|---|---|---|---|---|---|
| | 1,000 Pounds | | | | |
| Ontario: | | | | | |
| Flue-Cured | 104.2 | 140.2 | 127.6 | 127.4 | 163.0 |
| Burley | 5.7 | 3.6 | 2.3 | 1.8 | 4.2 |
| Dark 1/ | .8 | 1.3 | 1.4 | 0.2 | 2/ |
| Quebec: | | | | | |
| Flue-Cured | 3.9 | 3.8 | 4.3 | 4.9 | 5.3 |
| Cigar | 4.5 | 3.7 | 2.7 | 3.4 | 4.3 |
| Pipe Tobacco | 1.1 | 1.1 | 1.3 | 1.1 | 1.8 |
| British Columbia: | | | | | |
| Flue-Cured | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |

1/ Greenriver and dark fire-cured. 2/ Not readily available.

Canada: Average yield per acre of tobacco by kind, averages 1934-48, annual 1949-53

| Year | Flue-Cured | Burley | Dark 1/ | Cigar |
|---|---|---|---|---|
| | - - - - - - - - - - - - | Pounds - - - - - | - - - - - - - | - - - - - - |
| Average: | | | | |
| 1934-38 | 1,034 | 1,203 | 1,104 | 1,110 |
| 1939-43 | 1,100 | 1,272 | 1,330 | 1,063 |
| 1944-48 | 1,077 | 1,128 | 1,128 | 1,171 |
| Annual: | | | | |
| 1949 | 1,286 | 1,357 | 1,362 | 1,032 |
| 1950 | 1,175 | 1,217 | 1,343 | 1,300 |
| 1951 | 1,294 | 1,457 | 1,386 | 1,243 |
| 1952 | 1,534 | 1,673 | 1,727 | 1,227 |
| 1953 | 1,382 | 1,560 | 1,503 | 1,227 |
| 1954 2/ | 1,388 | 3/ | 3/ | 3/ |

1/ Greenriver and dark fire-cured. 2/ Preliminary. 3/ Not available.
Source: Quarterly Stocks and Consumption of Unmanufactured Tobacco, Dominion Bureau of Statistics, Canada March 1954, and reports from U. S. Foreign Service Officers.

Canada: Average price per pound of tobacco paid to growers by kind, averages 1939-48, annual 1949-53

| Year | Flue-Cured | Burley | Dark | Cigar |
|---|---|---|---|---|
| | - - - - - - Canadian | Cents per pound | - - - - - - | - - - - - - |
| Average: | | | | |
| 1939-43 | 23.85 | 15.09 | 11.93 | 11.43 |
| 1944-48 | 36.62 | 27.06 | 24.06 | 24.28 |
| Annual: | | | | |
| 1949 1/ | 42.08 | 30.47 | 23.29 | 22.50 |
| 1950 1/ | 44.49 | 30.04 | 27.89 | 22.01 |
| 1951 1/ | 44.24 | 30.15 | 24.94 | 22.88 |
| 1952 1/ | 41.58 | 29.55 | 23.81 | 22.85 |
| 1953 1/ | 43.70 | 31.28 | 20.92 | 24.16 |

1/ Does not include 2 cents per pound paid to growers since 1947 for grading and tying. Prior to that time grading and tying were done by the companies purchasing the leaf.
Source: Quarterly Stocks and Consumption of Unmanufactured Tobacco, Dominion Bureau of Statistics, Canada March 1954.

## Flue-Cured

Production of tobacco in Canada is expected to establish an all-time high of 178.5 million pounds this year. The estimate of flue-cured output for 1954 also is expected to be an all-time of 168 million pounds which is 36 million above 1953 and about 24 million pounds above the previous high of 144 million pounds in 1951. On the basis of a 1954 outturn of 168 million pounds of flue-cured and a moderate rate of increase in consumption, there would remain a surplus of 68 million pounds on a farm sales weight basis or 60 million pounds on a re-dried weight basis available for export (based on an increase in usings of one-eighth above the 1953 level when 78.8 million pounds of re-dried flue-cured was used and assuming no changes in stocks).

The Canadian output of flue-cured has risen rapidly as indicated by the following production data:

Canadian flue-cured production, 1934-54, farm sales weight

| Period | Million Pounds |
|---|---|
| 1934-38 Avg. | 43 |
| 1939-43 Avg. | 66 |
| 1944-48 Avg. | 94 |
| 1949 | 117 |
| 1950 | 108 |
| 1951 | 144 |
| 1952 | 132 |
| 1953 | 132 |
| 1954 | 168 |

## Producing Areas

Over 90 percent of Canadian flue-cured is produced in Southern Ontario. Originally, most of the flue-cured was grown in Essex and Kent Counties near the cities of Windsor, Canada and Detroit, Michigan, U.S. Only about 2,600 acres was produced in these two counties in 1953 and it is believed that about 2,765 acres was grown in 1954. The village of Delhi is almost in the center of the main flue-cured producing area, which is concentrated largely in Norfolk, Elgin, Oxford and Brant Counties with some in adjacent areas. Norfolk is by far the most important producing county. This area is just north of Lake Erie and approximately 90 miles west of Niagara Falls. Some flue-cured is produced in Middlesex County, chiefly in Caradoc Township, which is about 65 miles west of the main growing area indicated above. In the last 10 years, flue-cured tobacco has been grown in the vicinity of Port Hope in Durham County, which is near Lake Ontario and about 70 miles east of Toronto. An Ontario Department of Agriculture representative indicated that this year 71 growers planted 2,700 acres of tobacco in this area, which resulted in a production of about 3 million pounds. A local tobacco specialist estimates that production could be greatly increased in the Port Hope area as there is an adapted strip of soil about 20 miles wide in Durham and part of Northumberland Counties along Lake Ontario. Another newer flue-cured growing area is located in the Camp Borden-Alliston region of South Simcoe County (about 75 miles northwest of Toronto) which has been producing tobacco for 4 or 5 years. Since 1949, some flue-cured has been grown in the Port Elgin area of Bruce County. This area is about 120 miles northwest of Toronto on the peninsula extending between Lake Huron and Georgian Bay. This year six Bruce County farmers produced approximately 200 acres of tobacco and there is about 2,000 acres of adapted soil near the lake. There is considerable additional land on an Indian Reserve, north of Port Elgin, which appears to be suitable for tobacco production.

With the full base acreage permitted in 1954, members of the Flue-Cured Tobacco Growers Association of Ontario could have grown 120,000 acres of tobacco, but it is estimated that a total of 110,000 acres were actually planted by members of Ontario Association with 5,700 acres grown in Ontario by producers outside the Association.

In 1954, approximately 5.3 million pounds of flue-cured was produced on 5,525 acres in Quebec Province. In Quebec, the 1954 acreage of flue-cured tobacco production was as follows: Joliette District, including counties of

Joliette, Berthier and l'Assomption, 4,620 acres; Three-Rivers District, including counties of St. Maurice and Champlain, 600 acres; Contrecoeur District, including counties of Vercheres and Richelieu, 255 acres; Soulanges District (in county of Soulanges), 50 acres. Output has been increasing steadily in the last few years and a specialist of the Quebec Provincial Government has stated that if markets could be found for additional output that production could be raised to 20 million pounds or more within the next 10 years. Approximately one-third of the 1953 acreage was grown by members of "La Cooperative des Tabacs Laurentiens," while the remainder was produced by non-coop growers. The area of adapted soils and labor supply is sufficient for considerable expansion. However, it is difficult to predict the extent of future production in this area as most of the growers are not members of the Cooperative, and it is uncertain as to how they might fare in competition with members of the coop and growers associations (under this system, members are given first preference by all Canadian buyers) or under a program of production controls administered by the Dominion Government.

This year, about 125,000 pounds of flue-cured was grown in the Frasher Valley of the Province of British Columbia. Several years ago, more than one-half million pounds was produced in this area, but output has been declining as prices have been low and the area is far from existing markets.

Quality and Varieties

The flue-cured is of a good, bright color and is considerably heavier in body than is U. S. leaf. The plant is topped at an earlier stage of growth than is U. S. flue-cured. As indicated above, Canadian leaf is of good quality and has distinct characteristics of its own, differing substantially from U. S. leaf in regard to aroma, flavor, and thickness of leaf, but the flue-cured being harvested in the early part of the 1954 season did not appear to be quite ripe by American standards. Also, the taste of cigarettes seem to indicate that the tobacco used in them was not ripe by U. S. standards. The distinctive taste of such tobacco would undoubtedly be noticed by U. S. consumers, but apparently no serious problems have arisen in this connection with Canadian or British consumers.

About 75 percent of the flue-cured is the Delcrest variety with Hicks and Virginia Gold accounting for most of the remainder.

Flue-Cured Consumption

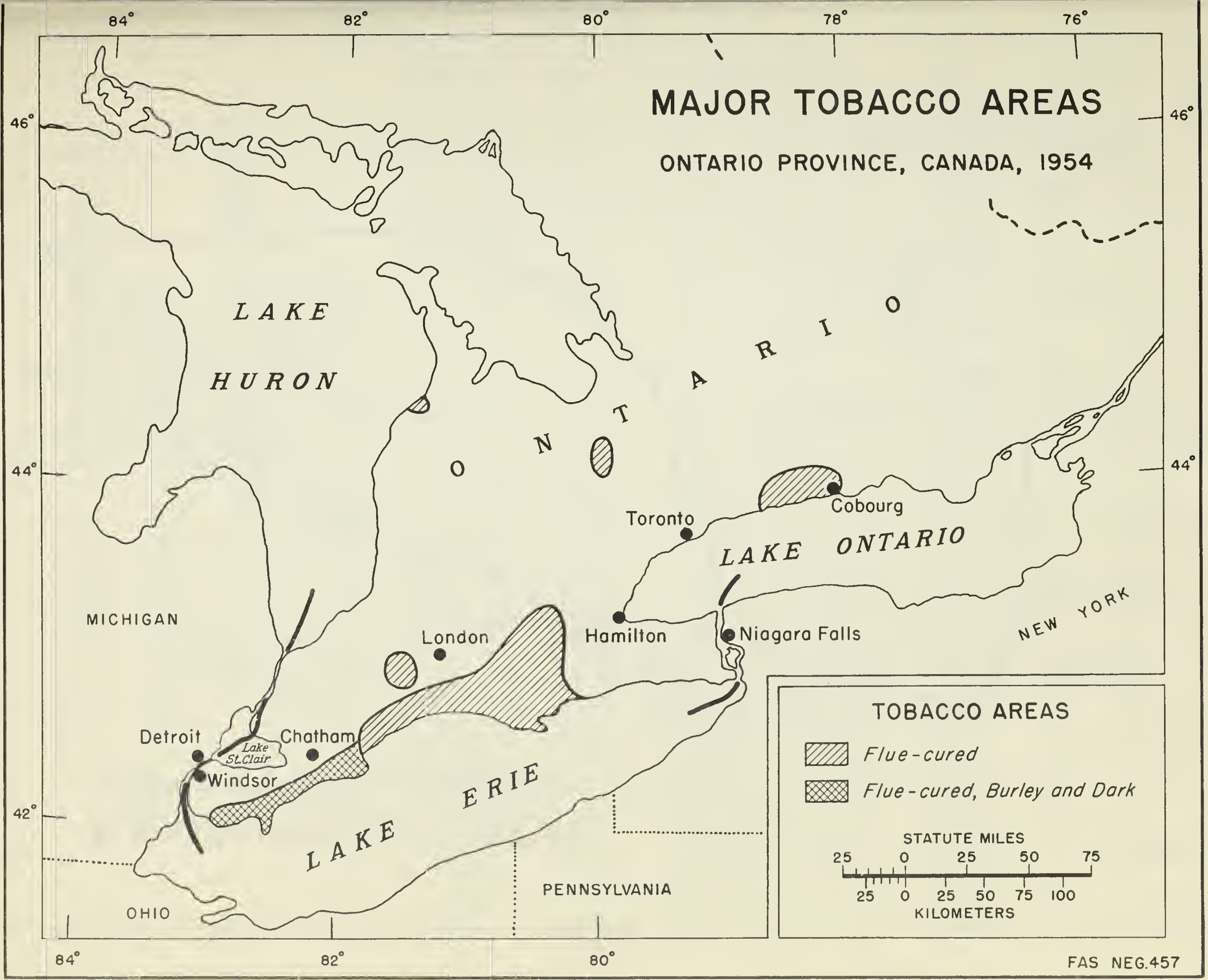
Domestic consumption of flue-cured has been increasing rapidly as indicated by the amounts of re-dried flue-cured withdrawn for use in the manufacture of products in recent years.

| Year | Amount (Millions of Pounds) |
|---|---|
| 1949 | 69.9 |
| 1950 | 70.5 |
| 1951 | 63.9 |
| 1952 | 73.7 |
| 1953 | 78.8 |

This upward trend is expected to continue as population and incomes are rising at the same time that there is a shift to cigarettes and a decline in per capita consumption of other types of tobacco products.

# MAJOR TOBACCO AREAS

## ONTARIO PROVINCE, CANADA, 1954



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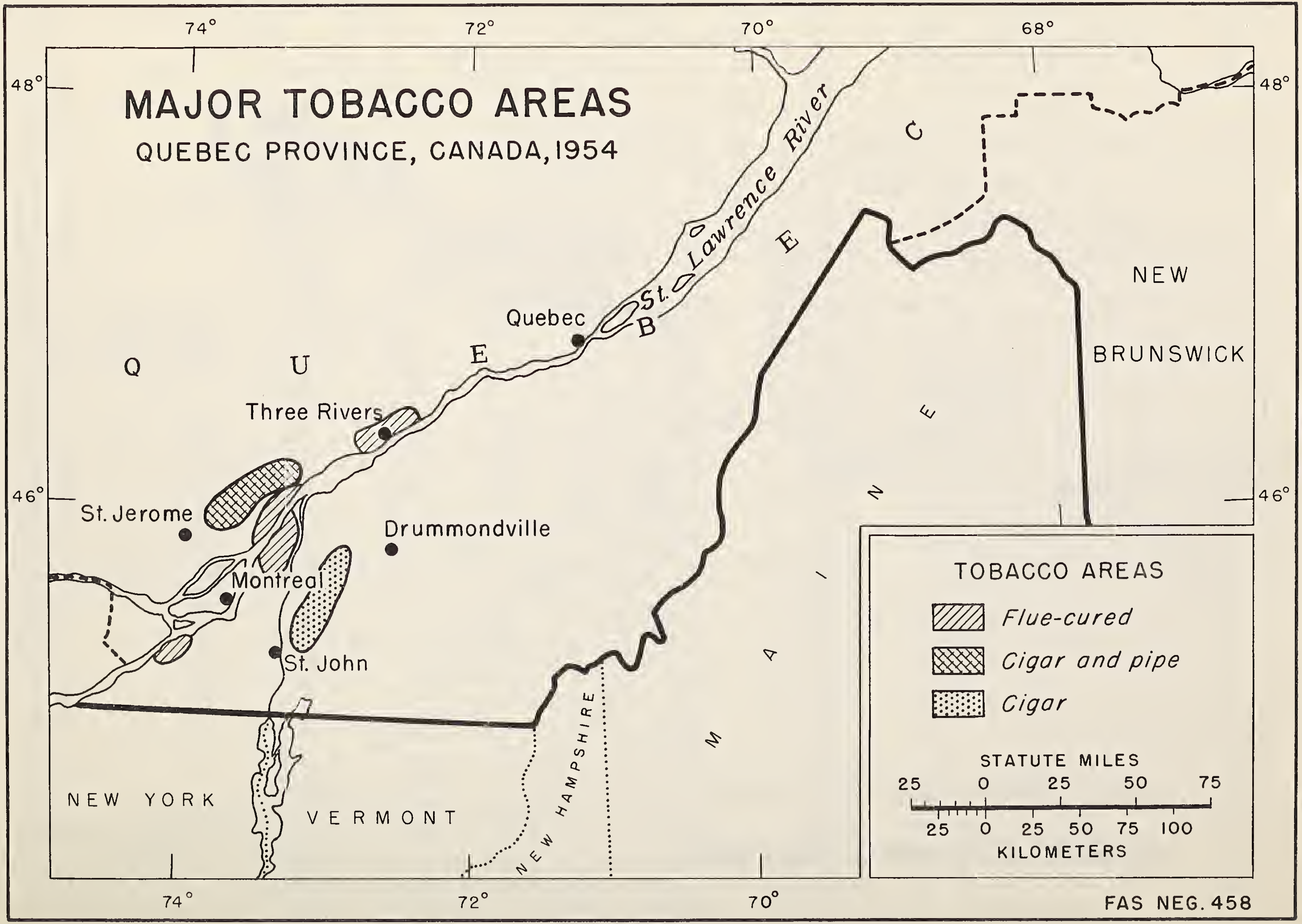

## MAJOR TOBACCO AREAS

QUEBEC PROVINCE, CANADA, 1954

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Burley

The burley produced in Canada is heavy and red, and has been used chiefly in pipe and chewing tobacco, although some is reported as used in cigarettes.

Burley is produced in the Old Belt, confined almost entirely to Essex and Kent Counties (near Windsor).

In 1954, members of the Ontario Burley Tobacco Growers Association were permitted to increase their plantings to 4,832 acres (150 percent of the 1953 area), but only 3,122 acres were planted. The 1954 acreage was 2.84 times that in 1953, but far below earlier levels.

There are plans for increasing the production of light burley; however, it is difficult to predict the future of this kind of leaf as no truly light (cigarette type) burley is now produced in Canada. It is possible that more light burley will be used in cigarettes consumed domestically, but tobacco specialists in the Dominion Department of Agriculture report that the American-blend type of cigarette is not popular in Canada, even though there reportedly have been numerous efforts to expand production and consumption of this type. However, prior to the reduction in taxes and prices of Canadian cigarettes in 1952 and 1953, there was a large volume of U. S. cigarettes consumed in Canada. Also, American tourists account for a fairly large demand for American-blend type cigarettes.

It is impossible to evaluate accurately the extent of success that Canada might have in developing increased export outlets for burley, but it would appear very difficult to attain a large expansion in foreign markets.

With the exception of the four years, 1935-39, burley production has always been controlled. The Burley Marketing Association of Ontario (composed of growers and buyers) allots the acreages to be grown and carries out a program of guaranteed minimum prices. The planted acreages of burley in the last few years have been only about two-thirds of the acreages allotted.

Acres allotted and area planted by members of the Burley Growers Association of Ontario, 1952-54

| Year | Allotted | Planted |
|---|---|---|
| | acres | acres |
| 1952 | 2,415 | 1,406 |
| 1953 | 1,933 | 1,098 |
| 1954 | 4,832 | 3,122 |

Source: Burley Marketing Association of Ontario.

Like flue-cured, the burley is purchased directly from the farmer by buyers, as there is no auction system.

Burley producers received an average of about 30 Canadian cents per pound in the 1949-52 period with a slight rise to 31.3 cents per pound in 1953. This is only about two-thirds of the average price received for Canadian flue-cured in the last five years and this difference in prices is conducive to a shift to production of flue-cured, wherever soils are adaptable. However, most of the soils in the Old Felt are too heavy for production of high quality flue-cured. Yields of burley have risen greatly in recent years from 1,128 in the 1944-48 period to an average of 1,563 pounds in the last three years (1951-53 average).

Output this year (1954) is greater than that of the last three years, but with this exception is the lowest outturn in more than 30 years. Output reached peak levels in the late 1920's and early 1930's and declined sharply thereafter. About 4.7 million pounds of re-dried burley were used in the manufacture of products in 1953, which represents a continuation of the downward trend in usings during the last 5-year period.

## Cigar Tobacco Production

Most of the domestic production of cigar tobacco is binder and filler. All of the commercial cigar leaf production is in Quebec Province. Cigar leaf is grown in the following areas (1954): St. Jacques District (including counties of Montcalm, l'Assomption, Joliette and Berthier) 4,000 acres with a production of approximately 3,250,000 pounds; the St. Cesaire or Yamaska River Valley District (including counties of Rouville, Bagot and Iberville) 1,100 acres with a production of 1,000,000 pounds.

There are two cooperatives - - Societe Cooperative Agricole de Tabac du District de Joliette and La Societe Cooperative agricole de la Vallee d'Yamaska, St. Cesaire, which purchase approximately 85 percent of the cigar leaf with the remainder sold to independent dealers. These grower-members own the cooperatives with which they have 5-year contracts for production and purchase of the cigar leaf. The farmer grades the tobacco into three grades (top, middle and bottom leaves), bales the loose (untied) leaves and delivers the baled tobacco to the cooperatives. The leaf is regraded and processed by the cooperatives and sold to manufacturers. Early each spring, the manufacturers inform the cooperatives of anticipated requirements for the next year. Members of the cooperatives organize their production largely on the basis of this information. Each grower-member of the cooperatives receives an allotted acreage on the basis of available labor, curing space and sometimes, previous acreage grown. This is done on a voluntary basis. Each spring, the growers' associations together with the buyers negotiate the prices to be paid by the buyers. The main factors considered in fixing the price are over-all demand for cigars and situation of the cigar industry, quality of the crop and production and processing costs.

Stocks of cigar tobacco were low by the end of 1953 and members of the cooperatives were allowed to increase 1954 plantings to the extent of curing facilities available. This could have resulted in an output of as much as 5 million pounds, but weather was not favorable during much of the 1954 growing season. Production is estimated at 4.3 million pounds this year, which is somewhat above 1953, but about average for the last 10-year period. Domestic production may rise somewhat, but is not expected to change greatly in the immediate future.

Significant amounts of cigar leaf are imported from the U. S. and Cuba.

## Consumption

The use of cigar leaf has been rising the last few years and demand is expected to remain strong, if a high level of economic activity is maintained.

Cigar re-dried leaf taken for manufacture, 1949-53

| Year | Amount |
|---|---|
| | Million Pounds |
| 1949 | 4.52 |
| 1950 | 4.60 |
| 1951 | 4.54 |
| 1952 | 5.10 |
| 1953 | 5.95 |

## Dark (Greenriver and Fire-Cured) Production

Dark tobacco as reported in Canada includes only Greenriver and the fire-cured types. Cigar leaf and "pipe" are indicated separately, even though they are largely dark air-cured types.

Dark tobacco (Greenriver and fire-cured types) is produced in the Old Belt (Northeast of Windsor). Production of these kinds of tobacco has never been large and has been declining. Average annual production was about 1.5 million pounds in the 1948-52 period. Due to heavy stocks, the acreage was reduced sharply in 1953 and was again very low in 1954, but production this year is reported to be somewhat larger than in 1953. On the basis of present demand, an output of about one million pounds could be absorbed annually, but future production is expected to be small as demand for this kind of leaf is declining.

## Consumption

About one million pounds (re-dried weight) of dark air-cured and fire-cured leaf was used in 1953. This is above usings in 1952, but is lower than for any other recent years, representing a continuation of the downward trend in consumption of products in which these kinds of leaf are used.

Dark air-cured and fire-cured (excluding cigar) withdrawn for manufacture, 1949-53, re-dried weight

| Year | Amount |
|---|---|
| | Million Pounds |
| 1949 | 1.30 |
| 1950 | 1.26 |
| 1951 | 1.24 |
| 1952 | .90 |
| 1953 | 1.01 |

## Other Types Reported as "Pipe Tobacco"

Quebec Province has always produced some tobacco reported as "pipe" leaf. It has frequently been further divided into small, medium, and large pipe tobacco. The pipe tobacco District includes the counties of Montcalm, l'Assomption, Joliette and Berthier, with a 1954 production area of 2,100 acres.

A wide variety of types is included in this category - - dark air-cured varieties, types which resemble red burley (however, producers report that they are not burley), and several miscellaneous types which appear to be largely crosses between cigar or other dark air-cured varieties.

One very unusual type is grown in small plots on farms widely scattered throughout Quebec Province and it resembles the "garden" flowering types, having narrow sharp-pointed leaves that are spaced far apart on a very slender stalk. This type may be a cross between Oriental and dark air-cured or cigar types or introduced many years ago from some other area. This tobacco is very strong and aromatic, and is smoked largely by the older men of French descent.

Commercial output of pipe tobacco is well below actual consumption as a large number of farmers in Quebec Province raise a few rows of pipe tobacco for their own use.

Quantity of re-dried pipe tobacco taken for manufacture, 1949-53

| Year | 1,000 pounds |
|---|---|
| 1949 | 471 |
| 1950 | 548 |
| 1951 | 545 |
| 1952 | 575 |
| 1953 | 593 |

## Exports of Unmanufactured Tobacco

Over 96 percent of total exports in the last three years has been flue-cured, but some burley, dark air-cured and dark fire-cured are also shipped to foreign countries.

Total foreign shipments of unmanufactured tobacco have increased rapidly as indicated by the following export data: 11.2 million pounds annually in the 1940-44 period, 17 million average per year in the 1945-49 period, 26.8 million in 1951, 38.5 million in 1952 and 28.5 million in 1953 with total exports in the first six months of 1954 rising to 22.5 million pounds compared to 12.6 million in the first six months of 1953.

## Advantage of Canadian Leaf in Certain Export Markets

Canadian leaf enjoys an import duty in the United Kingdom which is 21.6 cents per pound lower than that paid on leaf from the U. S. and other countries, outside of the British Commonwealth. Canadian exporters have another advantage in that somewhat lower prices are paid for Canadian tobacco than for U. S. leaf.

It appears to be a policy of the Ontario Flue-Cured Tobacco Marketing Association to maintain prices at levels somewhat lower than those paid for U. S. leaf in an effort to increase Canadian exports. The average prices paid to Canadian producers have consistently been lower than those received by U. S. farmers. Canadian farmers received an average of 46.7 (U. S. cents, equivalent) per pound (including 2 cents per pound for grading and tying) for flue-cured in 1953 compared to 52.7 cents paid to U. S. flue-cured producers in 1953. These advantages together with the potential for greatly expanding Canadian production, indicate that U. S. producers will face stronger competition from Canadian flue-cured in certain export markets.

## Flue-Cured Exports

About three-fourths of flue-cured exports are to the United Kingdom with most of the remainder going to British Commonwealth countries. Fairly large quantities are taken by the British West Indies, and since 1949, Australia has significantly increased imports of Canadian leaf. In the last two years (1952 and 1953) shipments to Trinidad, Jamaica, Barbados, and British Guiana were substantially above previous levels. Exports to Belgium and the Netherlands increased greatly in 1950 and 1951, but declined substantially in 1952 and 1953 from the peaks reached in 1950.

## Burley Exports

Practically all of the burley exports go to the United Kingdom. Foreign shipments averaged about 900,000 pounds annually over the last 10-year period, but declined to about 720,000 pounds annually in the last three years. Canadian burley is used chiefly in pipe and chewing tobacco in the United Kingdom.

## Exports of Other Types

Small quantities of dark air-cured and fire-cured, as well as other miscellaneous types are exported to the United Kingdom, British West Indies and Belgium.

## Exports of Stems and Trimmings

Several years ago, fairly large quantities of stems and trimmings were exported to the United States, Belgium and Sweden (also to Australia in 1950), but foreign shipments have declined sharply since 1950 to a total of only 100,000 pounds in 1953.

## Export Outlook

Exports of flue-cured are expected to continue upward, particularly to the United Kingdom, and British West Indies, although lack of Canadian dollars sometimes creates difficulties in these areas. The lower import duty and somewhat lower prices as compared to U. S. leaf are important factors in increasing Canadian shipments to the United Kingdom. Exports to Australia and Western Europe may expand, but there are obstacles to increasing shipments to these areas.

Although Canadian flue-cured is not as light as U. S. leaf and differs in regard to aroma and flavor, it is of good quality and is well-liked by many foreign manufacturers and consumers. It seems important enough to repeat that the portion of the 1954 crop harvested in the early part of the season and the taste of Canadian cigarettes indicate that flue-cured tobacco is harvested before it is fully ripe by U. S. standards. However, in summary, it seems likely that Canadian exports of flue-cured can be expanded substantially.

Canada: Exports of unmanufactured tobacco by kind and country of destination, averages 1940-44 and 1945-49, annual 1950-53 - re-dried weight

| Kind of Tobacco and Country of Destination | Average 1940-44 | Average 1945-49 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | |
| **Flue-Cured:** | | | | | | |
| United Kingdom | 6,384 | 12,557 | 14,612 | 22,593 | 30,990 | 22,244 |
| British Guiana | 123 | 183 | 211 | 170 | 207 | 203 |
| Barbados | 124 | 227 | 186 | 235 | 280 | 321 |
| Jamaica | 623 | 940 | 898 | 971 | 1,123 | 1,030 |
| Trinidad and Tobago | 787 | 910 | 810 | 900 | 1,421 | 1,361 |
| Leeward & Windward Island | 44 | 97 | 79 | 111 | 72 | 41 |
| Australia | 298 | - | 224 | 1,859 | 2,785 | 1,740 |
| Belgium and Luxemburg | - | 10 | 1,217 | 617 | 113 | - |
| Netherlands | - | 3 | 866 | 520 | 294 | 252 |
| Portugal | 80 | 40 | 65 | 210 | - | 44 |
| Newfoundland 1/ | 124 | 247 | - | - | - | - |
| Other Countries | 3/134 | 38 | 8/ 502 | 124 | 1 | 28 |
| Total | 8,721 | 15,252 | 19,670 | 28,310 | 37,286 | 27,264 |
| **Burley:** | | | | | | |
| United Kingdom | 1,254 | 1,053 | 781 | 430 | 820 | 917 |
| Newfoundland 1/ | 70 | - | - | - | - | - |
| Other Countries | 2/ 82 | 175 | 7/ 111 | 10/166 | - | - |
| Total | 1,406 | 1,228 | 892 | 596 | 820 | 917 |
| **Dark Air and Fire-Cured:** | | | | | | |
| United Kingdom | 459 | 250 | 184 | 150 | 118 | 122 |
| Leeward & Windward Islands | 1 | 1 | - | 14 | 19 | 7 |
| Belgium and Luxemburg | - | - | 1 | 37 | 2 | 15 |
| Other Countries | 56 | 5 | - | - | - | - |
| Total | 516 | 256 | 185 | 201 | 139 | 144 |
| **Other Unmanufactured Tobacco** | | | | | | |
| United Kingdom | 26 | 39 | 186 | - | - | - |
| Leeward and Windward Is. | 111 | 70 | 94 | 49 | 66 | 63 |
| Belgium and Luxemburg | - | - | 416 | 23 | - | - |
| Other Countries | 4/ 96 | 5 | 9/1,064 | 6/ | 4 | 6/ |
| Total | 233 | 114 | 1,761 | 72 | 70 | 63 |
| **Stems and Scraps:** | | | | | | |
| United States | 91 | 250 | 1,828 | 224 | 226 | 74 |
| Belgium and Luxemburg | - | 6/ | 1,935 | 18 | - | - |
| Other Countries | 5/ 227 | 34 | 10/ 489 | - | 9 | 26 |
| Total | 318 | 284 | 4,252 | 242 | 235 | 100 |
| GRAND TOTAL | 11,195 | 17,134 | 26,760 | 29,421 | 38,550 | 28,488 |

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1/ Newfoundland became a province of Canada on March 31, 1949. 2/ Includes 399,000 pounds exported to Portugal in 1943. 3/ Includes 667,000 pounds to China in 1940. 4/ Forty percent to British Guiana. 5/ For 1944 only, as countries of destination were not available for 1941-43. 6/ Less than 500 pounds. 7/ Principally to Mexico. 8/ Includes 220,000 pounds to Denmark and 216,000 pounds to Indonesia. 9/ Includes 880,000 pounds to Spain, 39,000 to Barbados and 137,000 to Netherlands. 10/ Includes 471,000 pounds to Netherlands and 18,000 pounds to Sweden.

Source: Trade of Canada. Annual and Quarterly Publications by the Dominion Bureau of Statistics.

Canada: Exports of re-dried leaf by country of destination in the first six months of 1954

| Country | Flue-Cured | Burley | Dark | Other | Stems and Cuttings | Total |
|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | |
| United Kingdom | 18,606 | 680 | 58 | 1/ | 1/ | 19,345 |
| British West Indies | 1,328 | – | 4 | 31 | – | 1,362 |
| Others | 2,750 | 52 | – | 1/ | 1 | 2,804 |
| Total | 22,684 | 732 | 62 | 31 | 1 | 23,511 |

1/ Less than 500 pounds.

Imports of Unmanufactured Tobacco

Most of the unmanufactured tobacco now imported is cigar and Oriental leaf. Imports of cigar leaf rose from about 600,000 pounds annually during the 1930's to a peak of 1.3 million in 1946. In the 1945-49 period, about half of the total foreign tobacco used was cigar leaf, but since that time, the amount of Cuba cigar leaf taken has declined substantially. Practically no Turkish was imported prior to 1936, but imports of this kind of leaf rose from less than three hundred pounds in 1936 to a peak of 397,200 pounds in 1946. Since that time, imports of Turkish have declined, but have remained at an average of slightly more than 300,000 pounds annually in the last few years.

Imports of U. S. Leaf

Prior to the expansion of flue-cured production in Canada, large quantities of U. S. leaf were imported. The imports of U. S. flue-cured by Canada declined to between 55,000 to 60,000 pounds annually in 1950, 1951, and 1953, although about 471,000 pounds were taken in 1952. The decline is likely to continue.

Many years ago, fairly large quantities of U. S. Burley were also imported, but practically none has been taken since 1948. Significant quantities of U. S. Burley were imported by Newfoundland prior to 1950, but none has been taken since this area became a province of Canada (March 31, 1949).

Imports of U. S. cigar leaf, mostly wrapper and binder, are important and have been increasing in recent years. Total imports of U. S. cigar leaf by Canada averaged 363,000 pounds annually in the 1948-52 period and rose to an all-time high of 599,000 pounds in 1953.

Canada: Imports of U. S. unmanufactured tobacco by kind, averages 1935-49, annual 1950-53 - declared weight

| Kind | 1935-39 | 1940-44 | 1945-49 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|---|---|
| | 1,000 pounds | | | | | | |
| Flue-Cured | 4,331 | 1,160 | 313 | 58 | 59 | 471 | 55 |
| Burley | 453 | 272 | 186 | - | - | - | - |
| Ky.-Tenn. Fire-Cured | 151 | 102 | 72 | 60 | 47 | 73 | 34 |
| Va. Fire-Cured | 143 | 27 | 12 | - | - | - | - |
| One Sucker | 30 | 44 | 36 | - | - | - | - |
| Total Cigar Leaf | 73 | 92 | 299 | 354 | 365 | 305 | 599 |
| Cigar Wrapper | 1/ | 1/ | 1/ | 301 | 295 | 140 | 390 |
| Cigar Binder | 1/ | 1/ | 1/ | 53 | 39 | 104 | 137 |
| Conn. Valley Broadleaf | 1/ | 1/ | 1/ | 1/ | 1/ | 29 | 50 |
| " " Havana Seed | 1/ | 1/ | 1/ | 1/ | 1/ | 23 | 11 |
| Wisc.& Other Types | 1/ | 1/ | 1/ | 1/ | 1/ | 52 | 76 |
| Cigar Filler | 1/ | 1/ | 1/ | - | 31 | 61 | 72 |
| Perique | 26 | 6 | 9 | 13 | - | - | 3 |
| Other | 8 | 2/ 12 | 2/ 13 | - | - | 3/ 5 | 3/ 9 |
| Total | 5,215 | 1,715 | 940 | 839 | 836 | 1,263 | 1,436 |

1/ Not available. 2/ Maryland. 3/ Trimmings, stems and scrap.

Imports of Kentucky-Tennessee fire-cured from the U. S. have averaged about 50,000 pounds annually the last three years, but are declining. The takings of this kind of U. S. leaf are expected to decrease further as the demand for products in which fire-cured is used declines.

Production and Consumption of Tobacco Products

Most of the tobacco consumed in Canada is used in the form of cigarettes, which are straight flue-cured or flue-cured blended with a little Turkish. Consumption has increased rapidly from 15.67 billion in 1951 to 21 billion in 1953. Prices of cigarettes have decreased recently, but are still high with the most popular grands produced domestically, retailing for 33, 35, 37, 40, and 41 Canadian cents per box of 20 pieces, although some brands retail at higher prices. A major portion of volume probably retails for 37 cents per (38.1 U. S. cents) pack. Cigarette taxes are high, but both taxes and prices were reduced substantially in 1952 and 1953. These price decreases greatly stimulated consumption and reduced the use of "foreign" cigarettes, a significant proportion of which were reportedly smuggled or otherwise illegally brought into the country.

Cigar consumption has been rising and was at an all-time high in 1953.

The total consumption of smoking tobacco has increased slightly in the last few years, although per capita use has decreased. Total as well as per capita use of snuff and twist have declined.

Canada. Domestic and imported re-dried leaf tobacco by kind, withdrawn for manufacture, 1949-53

| Kind | 1949 Domestic | 1949 Imported | 1950 Domestic | 1950 Imported | 1951 Domestic | 1951 Imported | 1952 Domestic | 1952 Imported | 1953 Domestic | 1953 Imported |
|---|---|---|---|---|---|---|---|---|---|---|
|  | 1,000 pounds |  |  |  |  |  |  |  |  |  |
| Flue-Cured | 69,781 | 134 | 70,440 | 75 | 63,894 | 38 | 73,382 | 351 | 78,709 | 64 |
| Burley | 6,372 | 54 | 6,004 | 28 | 5,086 | 1/ | 5,473 | 1/ | 4,714 | - |
| Drk.Air-Fire | 1,290 | 12 | 1,258 | 1 | 1,236 | 3 | 900 | 1 | 1,001 | 7 |
| Cigar | 3,388 | 1,128 | 3,380 | 1,219 | 3,359 | 1,185 | 3,729 | 1,363 | 4,515 | 1,436 |
| Pipe | 679 | - | 786 | - | 621 | - | 635 | - | 545 | - |
| Other | 2 | 469 | 7 | 542 | 8 | 537 | 1 | 574 | 1 | 592 |
| Total | 81,512 | 1,797 | 81,875 | 1,865 | 74,204 | 1,763 | 84,120 | 2,294 | 89,485 | 2,099 |
| Total Domestic & Imported | 83,309 |  | 83,740 |  | 75,967 |  | 86,414 |  | 91,584 |  |

1/ Less than 500.

Source: Quarterly Stocks and Consumption of Unmanufactured Tobacco. Dominion Bureau of Statistics, Canada. March 1954.

Canada: Tax-paid withdrawals of tobacco products for consumption, 1941-52

| Year | Cigarettes | Cigars | Cut 1/ | Plug 2/ | Snuff |
|---|---|---|---|---|---|
|  | Million Pieces | Million Pieces | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1941 | 8,582 | 191 | 24,973 | 2,994 | 872 |
| 1942 | 10,240 | 201 | 24,778 | 3,527 | 892 |
| 1943 | 11,257 | 196 | 23,792 | 3,505 | 910 |
| 1944 | 11,666 | 198 | 23,081 | 3,249 | 974 |
| 1945 | 14,265 | 207 | 25,337 | 3,193 | 972 |
| 1946 | 14,867 | 221 | 25,563 | 2,938 | 958 |
| 1947 | 15,143 | 216 | 24,916 | 2,662 | 975 |
| 1948 | 15,853 | 210 | 25,877 | 2,307 | 990 |
| 1949 | 16,840 | 208 | 25,218 | 2,537 | 955 |
| 1950 | 17,168 | 199 | 25,911 | 2,333 | 943 |
| 1951 | 15,667 | 169 | 27,297 | 2,011 | 869 |
| 1952 | 17,848 | 200 | 30,962 | 1,809 | 866 |
| 1953 | 21,001 | 236 | 26,142 | 1,751 | 839 |

1/ Includes smoking and chewing.

2/ Includes smoking, chewing, and twist.

Source: Quarterly stocks and Consumption of Unmanufactured Tobacco, Dominion Bureau of Statistics, March 1954.

## TYPICAL FLUE-CURED TOBACCO FARMS IN SOUTHERN ONTARIO

The typical flue-cured tobacco farm in Southern Ontario contains 100 acres of land on which an average of 30 to 35 acres of tobacco is grown. There are farms which have more or less than 100 acres of land and the acreage of tobacco varies considerably from farm-to-farm, but 100-acre farms with 30 to 35 acres of tobacco are fairly typical of flue-cured production in this area. Producers, who have grown tobacco for a long period of years, tend to grow larger than average acreages; while those, who have only recently begun producing, tend to grow smaller than average acreages.

Much of the flue-cured is grown on the shares with the sharecropper or "grower" responsible for supplying all of the labor. This differs from the sharecropper system in the U. S. as the sharecropper in Canada is, to a large extent, a manager and is usually responsible for the entire crop grown on that farm, hiring any additional labor required himself. The farm owner furnishes the machinery; equipment; grease, oil and fuel for equipment; and half of the fertilizer and curing fuel. The sharecropper usually pays for half of the fertilizer and curing fuel and all hired labor.

The sharecropper gets one-half of the crop and frequently receives an additional bonus based on the amount of tobacco produced.

Many of the farms are operated by immigrants, largely from Germany, Belgium, and Holland. Also, some farmers formerly lived in the United States.

### Investment and Facilities

The Canadian flue-cured producer is a big operator in terms of capital investment and amount of tobacco produced. The initial investment for purchases of a flue-cured tobacco farm is high being $60,000 to $100,000 or an average of $80,000 for a typical 100-acre farm which has average tobacco soil, a "base tobacco acreage" of 30 to 35 acres, and buildings in fairly good condition. If the buildings are in poor condition, the farm currently sells for $60,000 to $70,000, but if buildings are in good condition, the price is likely to be $80,000 to $100,000. In addition to the house and a barn for livestock, there are usually 5 to 7 (kilns) curing barns, one or two storage barns (pack and grading sheds), and one or two greenhouses where the plants are started. (It is too cold to grow plants outside in plant beds.) The curing barns are 24 feet by 24 feet (8 full tiers, plus 2 roof tiers high). Frequently the farmer owns a steam engine for steaming the beds and practically all farmers own a tractor and complimentary equipment. On some farms, where tobacco is grown by a sharecropper, there are two houses as the owner and sharecropper may both live on the farm, but on most typical tobacco farms there is only one house. On many farms there are a pond, pump and the necessary pipe for irrigating tobacco. Many new ponds were dug in 1953 and 1954, and the author observed several that were under construction during August 1954.

Specific Investment Items on Typical Southern Ontario
Flue-Cured Tobacco Farm

| ITEMS | AMOUNT |
|---|---|
| One Greenhouse 1/ | $ 2,000 |
| One Steam Engine | 2,000 |
| One Tractor and Complimentary Equipment | 4,000 |
| Six Kilns (Curing Barns), 24 feet by 24 feet plus burners | 10,000 |
| One Pack and Grading Shed, 70 feet by 40 feet | 5,000 |
| One House | 4 to 8,000 |
| Land and Other Improvements | 50,000 |
| Total | $ 80,000 |

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1/ Greenhouses are frequently about 100 feet by 27 feet.

## Soil and Crop Rotation

The main Southern Ontario flue-cured area, which centers in Norfolk County is relatively level and the sandy soil is excessively well-drained and fairly uniform throughout the area. Organic content of the soil is maintained and carry-over of disease kept to a minimum through a 2-year rotation of rye followed by tobacco. Rye is growing on the land approximately 19 months out of every 24-month period. The rye is planted as soon as tobacco is harvested and the rye is either harvested or disked-in when ripe during the summer following tobacco. In early spring of the second year following tobacco, the rye is plowed under. Sometimes fertilizer is applied when the rye is planted or disked-in.

Tobacco is practically the only cash crop produced in the concentrated flue-cured area with the exception of early sweet corn, which is grown in only a limited area in the southern part of the flue-cured area between the city of Simcoe (in Norfolk County) and Lake Erie.

## Diseases and Pests

The main Canadian flue-cured area is freer of diseases and pests than are most other tobacco producing areas. However, there are two pests, cutworms and wireworms, which frequently cause serious damage unless appropriate control measures are taken. A few years ago, the damage by wireworms was so great that future production throughout the entire tobacco area of Southern Ontario was uncertain. Various types of insecticides (sprayed on the land after it is plowed and disked into the soil prior to transplanting the tobacco seedlings) effectively control these pests. The spray material is reported to cost about $3.50 to $4.00 per acre. Also, damping-off in the greenhouses often causes considerable damage.

## Windbreaks

Throughout the area, poplars or evergreen trees are planted around the fields to serve as windbreaks. These reduce wind damage which otherwise may be great as winds of high velocity are fairly common in this area.

## Irrigation

The use of supplemental irrigation on flue-cured tobacco is fairly well developed in Canada and its use is spreading rapidly. The water is usually obtained from ponds which are fed by underground springs.

The investment required to carry out such irrigation varies widely depending largely on distance of the source of water from the fields to be irrigated. A pump and 4-inch aluminum pipe is usually used and the investment reportedly varies from about $3,000 to $15,000 per farm with the usual initial investment perhaps $5,000 to $8,000.

Supplemental irrigation of tobacco is profitable and many additional farmers plan to dig ponds. A few farmers, with whom this subject was discussed, indicated that they thought that through use of supplemental irrigation that average yields of 1,600 to 1,850 pounds of flue-cured per acre could be obtained as compared to an average of about 1,200 to 1,500 pounds without supplemental water. It is reported that in many years higher quality leaf is produced when supplemental irrigation is used. No adequate study relative to the differences in yield and quality with supplemental irrigation as compared to non-irrigated tobacco in Canada is available. However, farmers plan to expand its use and undoubtedly average yields and quality will thereby be improved.

## Seedling Production and Growing Period

In Canada, the seedlings are grown in greenhouses. The seeds are planted about April 5 if dry seeds are used, or April 10 if sprouted seeds are used. The usual frost-free period at Delhi in the center of the main flue-cured area is about 138 days extending from May 10 to September 30. Transplanting usually begins about May 15 to 20 or as soon as the danger of frost is past.

## Harvesting

The flue-cured tobacco is harvested largely by hired workers. In 1954 the harvest of flue-cured began about August 20 and was in full swing by the first of September. Much of the leaf primed in the first week of harvest did not appear to be quite ripe in terms of U. S. standards. The crop this year was late in maturing as lack of rain in the mid-growing season delayed development and topping. Late rains were adequate and yields were good, but cool weather and the late season created difficult problems in picking and curing the crop.

This year (1954) there was ample harvest labor in the area, although the numbers of highly skilled curers and primers from the United States were reported to be less than in recent years. The supply of harvest labor available this year was probably above normal, partly because a relatively large number of persons were unemployed in Southern Ontario.

Harvest labor is discussed in considerable detail below, as this is a very large cost item in producing flue-cured in Canada.

## Handling After Curing

After the leaf is cured, it is moved to the pack house and placed in bulks. The leaves are left tied to the sticks which are placed in large rectangular bulks on wooden pallets resting on the pack house floor. The tobacco remains here until it is sorted for delivery to the buyers.

## Grading and Baling

Grading, tying and baling were formerly done by the companies purchasing the leaf, but since 1947 these operations have been done by the farmer and workers hired by him. The tobacco companies pay the farmers two cents per pound to grade, tie, and bale the leaf. The purchasing company may have its own specifications as to how the leaf is to be sorted, but usually each curing (cutters, leaf, lugs, etc.) is sorted into six grades - - No. 1 bright, No. 2 bright, red, green, nondescript green and nondescript dark.

The leaf is pressed into bales weighing about 65 pounds, which are wrapped with paper and delivered to the purchaser in this form. The period of deliveries usually extends from about November 1 to January 1.

## Marketing

As indicated above, there is no auction system for selling and purchasing tobacco in Canada. The buyers visit the farms and purchase directly from the farmers. While leaf is in the bulk, buyers estimate the percentage of leaf in each grade in each curing, and a tag is attached indicating these percentages and the price offered by the buyers.

An inspector from the Marketing Association grades tobacco from about one-third of the farms in order to determine the quality as a basis for establishing and applying minimum prices to be paid to farmers. If a farmer is not satisfied with the proportion of leaf in each grade as estimated by buyers, he is entitled to have the inspector from the Ontario Flue-Cured Tobacco Marketing Association visit his farm and indicate the proportion of leaf in each grade. If the inspectors find that the quality of leaf is higher than that indicated by the buyer's grading, the buyer is required to pay the Marketing Association the additional amount (based on the grades determined by the inspector) which is then distributed to the farmer by the Marketing Association.

## Major Cash Cost Items

With the large production of flue-cured per farm in Canada, the cash costs are very important. Some of the more important cash costs are hired labor, fertilizer, power and machinery, curing fuel, fire insurance, hail insurance, operation and upkeep of the greenhouse and pest and disease control.

## Hired Labor

Frequently, in addition to the owner or sharecropper one or two members of the operators' family (usually older boys and sometimes girls) work throughout the growing season. Often the older girls and housewife assist in the peak labor requirement periods of transplanting and harvesting. On farms where the operator and one older boy or girl work throughout the season there frequently are two or three regular hired workers employed from early spring until the crop is harvested and perhaps until it is graded for market.

About 5 or 6 workers are usually used for transplanting the crop. The farmer, his wife and older children usually assist in this operation, but 2 or 3 extra workers are usually hired to help at this time.

During the growing period, 4 or 5 workers usually care for the crop. During this period in addition to the family labor, 1 or 2 hired workers are usually employed. The usual wage rate for such workers in 1954 was $6.00 per day. If 2 hired workers are employed from May 15 to September 15, the hired labor bill during the growing season would be about $1,000 to $1,100.

With this size of operation one of the main cash cost items is hired labor for harvesting the crop. During the harvest period, which usually extends over a period of 5 or 6 weeks, a crew of 15 workers are used - - 6 primers, 2 drivers, 4 leaf handlers and 2 tyers (usually women or children), and 1 curer. On the average farm, there would probably be two family workers so we will assume that 13 additional harvest workers are hired.

August-September 1954 wage rates per day for hired harvest workers were:

| Type of Workers | Rate Without Board | Board Furnished |
|---|---|---|
| Leaf handlers and drivers | $ 10 per day | $ 8 per day |
| Primers | 12 per day | 10 per day |
| Curer | 100 per week | 85 per week |

The hired labor bill for harvesting and curing is estimated at about $5,000 per farm.

Two or three workers are usually hired for 2 or 3 months for grading and tying. The wage rate for these workers is $8 without board and $5 to $6 with board furnished.

Hired labor bill on a typical flue-cured farm where the owner or grower and two other family workers are used during peak labor requirement periods is as follows:

| Hired Labor Cost: | Canadian Dollars |
|---|---|
| 1. Prepare and transplant:<br>3 hired workers at $7.00 per day for 14 or 15 days | $ 300 |
| 2. Cultivation, topping and suckering:<br>2 hired workers at $7.00 per day for 2 months | 700 |
| 3. Harvesting and curing:<br>6 primers, 4 leaf handlers, 2 drivers and 1 curer or a total of 13 workers hired for 6 weeks | 5,000 |
| 4. Sorting and prepare for market:<br>3 workers for 3 months at $6.00 per day | 1,200 |
| 5. Total hired labor cost . . . . . . . . . . . . . . . . | $ 7,200 |

Mechanization of Harvest

With the high cost of hired harvest labor, there is considerable thought given to means of reducing the amount of labor required for this operation.

Many farms are equipped with portable elevators which convey the sticks of tobacco from the tyers to the person who is hanging it in the barn. A horizontal door opens along the entire side of the barn; thus facilitating the "housing" operation.

Some farmers are attempting to reduce the labor bill by use of harvesting machines. About 40 tobacco harvesting machines have reportedly been sold in Ontario, but data as to the number actually in operation are not readily available. These machines are manufactured in the United States and retail for a base price of approximately $1,750 or a total of about $2,000 including the extra equipment used - - tarpaulin, sideboards, etc.

With this machine a total crew of 7 to 9 (excluding curer) is used to prime the leaf, tie it, transport it to the barn and hang it in the kilns (barns) The harvest crew with this machine includes 4 primers (suspended between the rows), 1 driver and 2 to 4 persons tying and hanging the sticks on racks. The primers put the leaves on chains which convey them to a platform above where the leaves are tied on sticks and hung on racks. When the racks are filled, the machine is driven to the barn and the same crew hangs the sticks in the barn.

One operator, who used this machine, indicated that with a crew of 7 about 1,000 sticks were handled in a 10-hour day; whereas, a crew of 9 could handle 1,250 sticks (enough to fill one barn 24 feet by 24 feet) in the same period of time. He stated that two persons tying and hanging the sticks (on the platform) could not handle the leaf as fast as 4 primers supplied it. This farmer used a crew of 9 so that the machine could be operated at a fairly high speed.

With this machine and a crew of nine persons there would be a saving of approximately $35 to $50 per day in cost of hired harvest labor (not taking into account cost of operating the machine), as a crew of 14 harvest workers is needed when priming is done in the usual manner. While there are no readily available cost data on operation of the harvest machine, the author would guess that it costs about $400 per year (including depreciation) or approximately $12.50 per 10-hour day. On this basis, use of this machine would result in a net saving of $23 to $38 per day or $700 to $950 per year on harvest labor on a typical farm with 32 acres of tobacco. However, it should be repeated that this is only an estimate as no operating cost data are available.

There is another aspect of the harvest operation which should be kept in mind - - influence of method of harvest on quality of cured leaf secured. No data are available as to average quality and value of machine harvested leaf as compared to that harvested by the traditional method. However, from observing the rate at which the machine traveled and the manner in which the primers picked the leaves, it would seem that very little, if any, selection as to ripeness, etc. could be made. The two lowest leaves remaining on the stalk were picked each time the primers went over a particular portion of the tobacco acreage. This is a very important matter and it is hoped that comparable data relative to quality of machine and non-machine harvested leaf will be available in the near future.

## Fertilizer

About 1,100 pounds of fertilizer, often 2-12-10, is applied per acre of tobacco. More than this amount may be used by some farmers, but specialists at the Delhi Ontario Tobacco Experimental Station recommend strongly that the soil be checked before more than 1,100 pounds are applied as their tests indicated that larger applications on most soils lower the quality of leaf obtained. If 1,100 pounds are applied to 32 acres of tobacco, the fertilizer bill would be approximately $750 for the entire tobacco crop. In addition to the fertilizer applied just prior to transplanting or as a sidedressing, many farmers also apply 100 to 400 pounds of fertilizer per acre prior to seeding cover crop of rye. If an average of 250 pounds were applied per acre on the cover crop, there would be an additional annual fertilizer cost of $270 per farm. It is probably reasonable to assume that the average fertilizer bill is about $1,000 per farm.

## Hail Insurance

There is considerable risk of hail damage, especially in the northern portion of the main producing area of Ontario and many farmers have hail insurance. The rates reported vary from $5.50 per $100 valuation of tobacco in the south to $10 to $12 per $100 tobacco valuation in certain local areas further north where hail is more frequent. Those farmers who carry hail insurance have a cash outlay of $950 to $1900 for coverage of the tobacco crop depending largely on location of the farm in reference to frequency of hail during the growing season.

## Fire Insurance

Most of the farmers carry fire insurance which is also costly. The present rate most frequently reported is about $14 per $100 valuation of the tobacco. Most companies will not insure for more than 80 percent of the total value. On the typical farm, the fire insurance bill would probably be $200 to $225 on 80 percent coverage of the tobacco crop.

## Curing Fuel

Curing is also expensive. About two-thirds of the leaf is cured with oil, with coal, wood and propane used for curing the remainder. The average barn (24 feet by 24 feet) requires about 220 imperial gallons (about 265 U. S. gallons) per curing. The usual price paid per gallon of curing oil (in August 1954) was 20.8 Canadian cents per imperial gallon (equivalent to 17.12 U. S. cents per U. S. gallon). With an average of 2,000 pounds of leaf per "curing" per barn, the cost of curing fuel is equivalent to 2.355 U. S. cents per pound of cured leaf. A total of about 5,550 to 5,600 U. S. gallons of curing oil are probably used annually on the typical Canadian tobacco farm at a current total cost of approximately $960.

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FT 41-54 November 17, 1954

## JAPAN TO BUY $5 MILLION TOBACCO UNDER P. L. 480

On November 13, the Department of Agriculture announced commodity details of a $85 million surplus agricultural program for Japan under Title I of Public Law 480. A total of $5 million for tobacco was included in the announcement. This $5 million worth of tobacco (about 6 million pounds) will be sold for Japanese yen to the Tobacco Monopoly, and will be in addition to the usual commercial marketings to be purchased by the Japanese with "dollars." Sales will be handled by the private United States trade. A detailed agreement is now being prepared for formal approval by the two Governments, including the usual marketing guarantees.

This surplus sale of tobacco to Japan will partially make up a deficit in Japanese production of higher quality leaf. It will permit some increase in the output of top quality cigarettes, for which there is a growing demand in Japan. Also, it will enable the Japanese Tobacco Monopoly to increase the percentage of U. S. leaf now being used in several of its best selling brands. The increased consumption which would result would be in line with the aim of P. L. 480 to develop continuing markets for U. S. agricultural products abroad. Japan is one of our most promising long-term markets for high quality U. S. tobacco.

In response to increasing demand for high quality leaf for the manufacture of premium American-type blended cigarettes, exports of U. S. tobacco to Japan have been nearly one-third above prewar in recent years. During the period 1951-53, U. S. exports of leaf tobacco to Japan averaged 6.3 million pounds annually compared with 4.9 million in the prewar (1935-39) period.

The departmental regulation outlining the procedure for financing of sales under Title I is expected to be issued this week.

United States: Exports of unmanufactured tobacco to Japan by type

| Year | Flue-cured | Burley | Ky.-Tenn. Fire-cured | All Other | Total |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Av. 1935-39 | 4,842 | 1 | 20 | 1 | 4,864 |
| 1951 | 1,926 | 5 | 3 | - | 1,934 |
| 1952 | 7,340 | - | 8 | 5 | 7,353 |
| 1953 | 9,510 | - | - | - | 9,510 |

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JAN 14 1955
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FT 42-54 November 29, 1954

## CURRENT TOBACCO DEVELOPMENTS IN IRAN

Current estimates of tobacco production in Iran at 28 million pounds indicate a decline from earlier 1954 estimates, chiefly as a result of dry weather in the eastern Caspian area. This is 31 percent less than last year's large output of 40.8 million pounds, but is slightly above average annual production in the five-year period immediately prior to 1953. Acreage in 1954 was estimated at 46,000 acres, well below the 67,000 acres harvested in 1953, but higher than in any of the five years just preceding.

Three kinds of tobacco are grown in Iran, namely, cigarette (oriental), pipe and tombac or water pipe tobacco. The oriental types have been developed from varieties introduced from Turkey, Greece and Russia. Production of this type has been increasing in importance and in both 1953 and 1954 exceeded 85 percent of the total acreage of tobacco and 75 percent of total output. Total production of oriental tobacco is estimated at 21 million pounds, 35 percent below the 32.6 million pounds produced in 1953, the peak year.

Production of oriental is concentrated in the regions of Azerbaijan, Gilan, Gorgan and Mazanderan, which are in the northwestern part of Iran near Turkey and the Caspian Sea.

Pipe tobacco production is concentrated in the districts of Azerbaijan, Kordestan, Kermanshah and Hamadan, which are in the western part of the country near the Iraq border.

Production of tombac (water-pipe) is scattered throughout the country, except in the desert regions and the area adjacent to Turkey, but it is reported chiefly in the districts of Shiraz, Isfahan, Kashan, Borazjan, Jeshed, Tabass, Golpayegan, Khonsar, Semnan and Shahrud.

Both pipe tobacco and tombac (water-pipe tobacco) have been decreasing in importance, while cigarette types (mostly oriental) have been increasing. Production of pipe tobacco has declined from 9 million pounds in 1949 to less than 4 million pounds in 1954. Tombac production has decreased almost one-fourth in the same period and is estimated at 2.9 million pounds in 1954.

Tobacco production in Iran is primarily for domestic consumption. Consumption is estimated at about 26 million pounds annually for the last 4 or 5 years. No imports of tobacco products or leaf have been reported since 1951, when approximately 73,000 pounds were received. Importation of cigarettes is prohibited by law.

Iran: Acreage of tobacco by kind, 1948 - 1954

| Year | Oriental (Turkish) | Pipe 1/ | Tombac or Water-Pipe | Total |
|---|---|---|---|---|
| | | 1,000 acres | | |
| 1948 | 14.8 | 14.5 | 6.2 | 35.5 |
| 1949 | 21.0 | 10.5 | 3.1 | 34.6 |
| 1950 | 32.1 | 8.7 | 3.0 | 43.8 |
| 1951 | 29.6 | 7.0 | 2.5 | 39.1 |
| 1952 | 30.3 | 5.9 | 3.0 | 39.2 |
| 1953 | 58.9 | 5.9 | 2.2 | 67.0 |
| 1954 | 39.4 | 4.5 | 2.2 | 46.1 |

1/ Known locally as "Chibook."
Source: Reports from Agricultural Attaches and other U. S. representatives abroad.

Iran: Production of tobacco by kind, 1948 - 1954

| Year | Oriental (Turkish) | Pipe 1/ | Tombac or Water-Pipe | Total |
|---|---|---|---|---|
| | | 1,000 pounds | | |
| 1948 | 9,451 | 9,023 | 3,788 | 22,262 |
| 1949 | 12,125 | 8,819 | 3,968 | 24,912 |
| 1950 | 21,524 | 7,694 | 3,968 | 33,186 |
| 1951 | 17,284 | 6,173 | 3,307 | 26,764 |
| 1952 | 20,282 | 5,201 | 4,079 | 29,652 |
| 1953 | 32,562 | 5,291 | 2,976 | 40,829 |
| 1954 | 21,164 | 3,968 | 2,866 | 27,998 |

1/ Known locally as "Chibook."
Source: Reports from Agricultural Attaches and other U. S. representatives abroad.

Exports of leaf tobacco and cigarettes in 1953 amounted to slightly less than 900,000 pounds, with Oman, Lebanon and Holland taking the major portion of foreign shipments. Most of the exports in the past have been leaf tobacco. In 1953, exports were considerably below levels of the two previous years when the U.S.S.R. took much larger quantities. Russia took 11 million pounds in 1951 and 3 million pounds in 1952 which accounts for 97 and 80 percent respectively of total exports in those years, but prior to 1951 practically no Iranian tobacco was imported by the U.S.S.R.

Tobacco exports in the first three quarters of 1954 have not been significant. According to reports from the Iranian Tobacco Monopoly, negotiations have been completed for the shipment of 5.4 million pounds of cigarette tobacco to the U.S.S.R. in exchange for sugar at the rate of 3 pounds of sugar per pound of tobacco.

In 1953, the Government of Iran initiated a program for expanding production of tobacco in order to increase exports and thereby earn more foreign exchange at a time when oil was not moving into trade channels. Accordingly, in 1953 output was almost 15 million pounds above normal domestic consumption, and stocks on hand January 1, 1954 stood at 72.3 million pounds (equivalent to about 32 months domestic requirements). By July, practically none of the surplus had been sold. At that time, the Tobacco Monopoly offered for sale to American cigarette manufacturers approximately 13.2 million pounds of tobacco from the 1953 crop. The leaf available is reported as oriental varieties (Trabizon, Tikulac, Basma and Samson) and is indicated by the Monopoly to be neutral tobacco suitable for blending with American types. Prices at which this oriental tobacco is offered range from about 9 cents a pound to 50 cents a pound f.o.b. Persian Gulf Port. No information is readily available as to the quality of these tobaccos. No transactions with this country have been reported. However, it is reported that the U.S.S.R. may take approximately 6.6 million pounds of Iranian tobacco in addition to the 5.4 million pounds already closed for.

Iran: Exports of leaf tobacco and cigarettes by country of destination 1/ 1950 - 1953

| Destination | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|
| | - - - - - 1,000 pounds - - - - - | | | |
| U.S.S.R. | - | 11,027 | 3,027 | - |
| Lebanon | - | 375 | 613 | 267 |
| Holland | 970 | 124 | 121 | 126 |
| Oman | - | 22 | - | 339 |
| Kuwait | 9 | 2 | 7 | 18 |
| Other | 20 | 225 | 13 | 145 |
| Total | 999 | 11,775 | 3,781 | 895 |

1/ Data are for 12 months from December 22 to December 21.
Source: Reports from Agricultural Attaches and other U. S. representatives abroad.

Prices for Iranian tobacco by variety and grade, 1954

| Grade | Trabison-Tikulac | Basma-Samson |
|---|---|---|
| | - - - - - Cents per pound 1/ - - - - - | |
| 1st | 45.4 | 50.3 |
| 2nd | 37.2 | 42.6 |
| 3rd | 30.4 | 35.4 |
| 4th | 20.9 | 25.4 |
| 5th | 8.6 | 9.1 |

1/ F.o.b. Persian Gulf Port.
Source: Report from Agricultural Attaches and other U. S. representatives abroad.

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FT 43-54 December 1, 1954

## MISCELLANEOUS TOBACCO DEVELOPMENTS

### Hugh C. Kiger is Named Acting Chief, Foreign Marketing Branch, Tobacco Division, FAS

Mr. Hugh C. Kiger was recently appointed Acting Chief of the Foreign Marketing Branch, Tobacco Division, Foreign Agricultural Service.

Mr. Kiger was raised on a flue-cured tobacco farm in North Carolina and has had extensive experience in producing and marketing tobacco in the United States and Canada. He graduated from North Carolina State College with a degree in Agricultural Marketing. During World War II he served in the Marine Corps in the Pacific theater, obtaining the rank of a Major prior to his discharge in 1946. Upon completion of graduate studies at North Carolina State and the University of North Carolina in the field of marketing in 1948, he was appointed Associate Director of Research for a private marketing firm in New York City. For the past five years he has been employed as a marketing expert in various capacities in the Department of Agriculture and in a defense agency.

Mr. Kiger will have responsibility for developing and carrying out FAS' program to promote the export of U. S. tobacco. He will travel extensively in important tobacco consuming countries where he will work with all segments of the tobacco industry, as well as with officials of foreign governments, in an effort to increase exports of U. S. tobacco. In this connection he will represent the Department in developing programs for the sale of tobacco for foreign currency under the provisions of the Foreign Agricultural Trade Development and Assistance Act of 1954. His observations and analyses will be made available to the U. S. tobacco industry in tobacco circulars and other media of the Department, as well as through personal contact with the tobacco trade.

### Philippine Republic to Allow Limited Imports of American Leaf

President Magsaysay of the Philippine Republic has authorized the importation of 7.9 million pounds of United States flue-cured tobacco to supplement supplies of domestic tobacco to be used in manufacturing during the first quarter of 1955. The law permits entry of approximately 7 million pounds during 1955 in addition to the presently authorized 7.9 million pounds. It further provides that the President may authorize further imports of tobacco if it is needed to meet requirements.

In order to receive import permits, cigarette manufacturers must prove that they have met all of the requirements of the Philippine tobacco law. The major item of compliance is a statement that the importer will purchase his proportionate share of the new domestic crop. Signing of a penalty contract will no longer be necessary.

A cable from Manila dated November 22 indicates that no licenses for leaf tobacco had yet been issued but that manufacturers had completed required affidavits on November 20. It also indicated that action on allocation of import permits might be started by November 27.

## Mexican Imports of Unmanufactured Tobacco Higher in 1954

The American Embassy at Mexico City reports that Mexican imports of leaf tobacco were about 1.7 million pounds greater in the first 8 months of 1954 than during the entire year of 1953. More than 99 percent of all imports of cigarettes were at about the same level as last year but they will be cut sharply in the future by a reduction in import licenses.

Mexico: Imports of Unmanufactured Tobacco and Tobacco Products

| Kind | 1952 | 1953 | 1954 (8 mos.) |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Unmanufactured Tobacco: | | | |
| Flue-Cured Leaf | 850.5 | 1,317.2 | 1,350.5 |
| Filler Leaf 1/ | 2,728.0 | 1,985.5 | 3,663.6 |
| Wrapper Leaf | 23.6 | 17.6 | 8.2 |
| Total Unmfr. Tobacco | 3,602.1 | 3,320.3 | 5,022.3 |
| Tobacco Products: | | | |
| Cigarettes | 126.3 | 249.1 | 173.9 |
| Other Mfr. Products | 17.2 | 18.5 | 9.5 |
| Total Tobacco Products | 143.5 | 267.6 | 183.4 |

1/ Previously Burley

## Egyptian Anti-Parasite Law Complicates Tobacco Importing

In July 1954, the Egyptian Government passed a law regulating the importation of agricultural products containing parasites. This was later amended to allow tobacco and some other products to enter without fumigation if they carry insects existing at present in Egypt or are accompanied by a disinfection certificate and examination shows its effectiveness. Reports state that in some cases this quarantine law has been applied in an arbitrary manner with a resulting hardship upon importers concerned.

The opinion has been advanced, that in the case of tobacco the Government is acting to protect the future tobacco growers of their country.

## Pakistan Plans Larger Tobacco Acreage

Pakistan newspapers report that the Thal Development Authority has reclaimed an area of 6,000 acres which is to be put into the production of cigarette tobacco. One thousand acres are to be cultivated immediately in a pilot operation. Officials of the Authority believe that tobacco may become a major crop in the Thal area.

## Indonesia's Difficulty in Producing Domestic Flue-Cured Tobacco

In an effort to ease its balance of payments position the Government of Indonesia has been actively promoting the domestic production of flue-cured tobacco. The usual problems have been encountered, such as soils, climate and rainfall; in addition there is the problem of persuading farmers to switch to the new crop. Experiments in Tapanuli, Sumatra have shown that flue-cured type of tobacco can be produced in that area. Local farmers, however, have not been eager to switch from the native variety of tobacco they are now producing.

## Canada's First-Half Stocks and Exports of Unmanufactured Tobacco

Total Canadian stocks of unmanufactured tobacco on June 30, 1954 were 185.9 million pounds compared to 194.8 million pounds on June 30, 1953. During the same period, stocks of unmanufactured flue-cured dropped from 162.7 to 159.6 million pounds and Burley from 14.1 to 10.0 million pounds.

Exports of Canadian leaf increased considerably from 13.6 million pounds in the first 6 months of 1953 to 23.5 million pounds for the first half of this year. Flue-cured tobacco was responsible for most of this rise as it increased from 12.6 million pounds in January-June 1953 to 22.7 million pounds for January-June 1954.

The United Kingdom was the largest market for Canadian tobacco exports and together with the Empire took 22.9 million pounds out of the total of 23.5 million pounds exported in the first half of 1954.

## Japan Expects Record Tobacco Crop in 1954

A recent report from Japan indicates that a record tobacco crop will be harvested this year. Total production is expected to reach 255.1 million pounds, of which 155.8 million pounds is flue-cured. Production would have been even larger except for recent damage to growing areas by storms and unfavorable weather. Even this large crop will not provide an adequate stock reserve as consumption of tobacco in Japan has increased faster than production since rationing was discontinued in March 1950.

Japan: Production of Unmanufactured Tobacco By Kind
In Recent Years - Farm Sales Weight

| Period | Flue-Cured | Burley | Native (Dark Air) | Total 1/ |
|---|---|---|---|---|
| | million pounds | million pounds | million pounds | million pounds |
| Average: | | | | |
| 1935-39 | 74.3 | 3.0 | 71.4 | 148.7 |
| 1945-49 | 42.0 | 9.6 | 84.3 | 145.9 |
| 1950 | 105.5 | 4.7 | 106.0 | 216.2 |
| 1951 | 108.7 | 4.1 | 98.1 | 210.9 |
| 1952 | 110.3 | 3.9 | 96.4 | 210.6 |
| 1953 | 126.7 | 4.2 | 95.6 | 224.4 |
| 1954 2/ | 155.8 | 3.4 | 95.9 | 255.1 |

1/ Does not add to total as figures have been rounded.
2/ Preliminary estimates.

## Portugal's January-June 1954 Tobacco Imports

Portugal imported 5.4 million pounds of unmanufactured tobacco during the first half of 1954 compared with 4.8 million pounds for the first half of 1953. The United States supplied 3.8 million pounds during January-June of 1954 -- about 300,000 pounds more than in January-June 1953.

The United States held its relative share of the Portuguese market; 72 percent for the first 6 months of 1953 compared with 70 percent for the same period of 1954.

Portugal: Imports of Unmanufactured Tobacco by Country of Origin January-June, 1953 and 1954

| Country of Origin | Jan-June 1953 | Jan-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| United States | 3,508 | 3,796 |
| Portuguese Possessions | 319 | 373 |
| Greece | 669 | 855 |
| Other | 345 | 398 |
| Total | 4,841 | 5,422 |

## Swedish Tax Concessions Stimulate Cigar Sales

Sales of cigars and cigarillos in Sweden during the first half of 1954 increased 25 and 14 percent respectively over the corresponding period of 1953. This is the direct result of tax revisions by the Swedish Government designed to stimulate the consumption of these products and to hold cigarette consumption at its present level.

On April 1, 1954 new taxes went into effect that lowered the retail price of cigars and cigarillos 10 percent while raising the tax rate on cigarettes to increase the retail price 4-5 percent. This differential has evidently been quite successful as is shown by the following chart:

Sweden: Sales of Tobacco Products; Comparison of First Half of 1954 with First Half of 1953

| Kind | Domestic Products | Imported Products | Total |
|---|---|---|---|
| | (Percentage Change in Quantity) | | |
| Cigars | + 21.0 | + 44.0 | + 24.6 |
| Cigarillos | + 14.1 | + 11.6 | + 14.0 |
| Cigarettes | + 1.6 | + 1.0 | + 1.6 |
| Smoking Tobacco | + 2.2 | - 21.4 | + 0.8 |
| Chewing Tobacco | - 2.4 | -- | - 2.4 |
| Snuff | + 0.1 | -- | + 0.1 |

## Water Reserves Low in South Africa's Flue-Cured Area

Tobacco growers in the Rustenburg area of the Union of South Africa are disturbed over the supply of irrigation water for this year. The major part of the Union's flue-cured tobacco is produced in this area under irrigation. Transplanting of the 1954-55 crop will begin in October. Irrigation officials say there is enough water to transplant but if there is not a substantial rainfall soon after planting, the outlook for the crop would become unfavorable.

The Union of South Africa has been promoting the production of flue-cured tobacco in order to move it into world export markets. They have met with some success in developing overseas markets but a drought with the attending crop poundage and quality loss would be a serious set-back.

## Increased Production of, and Competition from Canadian Flue-Cured Tobacco

Recently, announced estimates of Canadian tobacco production for 1954 point to a further increase in competition with United States leaf in world markets. The latest estimate for the 1954 crop places total output at 178.5 million pounds; 168.4 million pounds will be flue-cured tobacco. This is an all-time high in both total and flue-cured tobacco production.

Flue-cured tobacco accounts for most of the Canadian tobacco exports. Principal foreign customers are the United Kingdom, British West Indies, Australia, the Netherlands and British Guiana. Significant quantities of Burley and dark leaf are shipped to the United Kingdom; small amounts of these types go to the British West Indies and Belgium.

## Drought Cuts Greek Tobacco Crop

Excellent prospects in the Greek tobacco export situation caused a large increase in acreage planted to tobacco this year, but extremely dry weather cut production severely. During 1953, 220,000 acres produced about 136.3 million pounds of tobacco. In 1954, the same quantity is expected from 266,000 acres.

The reduction in the crop expected this year, together with the almost complete absence of old stocks, has forced up export prices to about 15-20 percent above last year's levels. Exportable tobacco stocks as of September 1, 1954 were about 134.5 million pounds. Exports through June 1954 were 42.4 million pounds.

## Tobacco Sales on Salisbury, Southern Rhodesia Markets Greater Than Expected

Sales of tobacco on Salisbury, Southern Rhodesian markets in the period April 13 through September 9 amounted to 106.7 million pounds. Total sales this year have been estimated at about 5 million pounds greater than estimated earlier. The sales of Southern Rhodesia flue-cured this year are now estimated at 117 million pounds as compared to 112.5 forecast earlier.

Sales by area of destination during the April 13 - September 9, 1954 period are reported by the Southern Rhodesian Tobacco Board as follows:

| Country of Destination | Million Pounds | Percent of Total |
|---|---|---|
| United Kingdom | 63.3 | 59.32 |
| Australia | 9.3 | 8.71 |
| Other Foreign Markets | 29.0 | 27.23 |
| Local Markets | 5.1 | 4.74 |
| Total | 106.7 | 100.00 |

## Greece Facilitates Tobacco Exports with More Trade Agreements

On September 1, 1954 Greece and Egypt extended their trade and payments agreement to run until August 31, 1955. This agreement encourages the flow of Greek and Egyptian trade. During the 12 months ended May 31, 1954 Greece shipped U. S. $1,568,000 worth of tobacco and cigarettes to Egypt.

The Greek trade and payments agreement with France was renegotiated in July of this year to run until June 30, 1955. Under this agreement Greece is allowed to export 9.1 million pounds of tobacco and U. S. $45,000 worth of cigarettes to France and French possessions.

## Dominican Republic: Tobacco Exports First Half of 1954

During the first 6 months of 1954 the Dominican Republic exported 4.4 million pounds of unmanufactured tobacco. This was a drop from the 4.7 million pounds shipped in the same period of 1953. However, the smaller amount of tobacco exported during the first half of 1954 sold for $900,000 compared to the $700,000 received for unmanufactured tobacco shipped during January - June 1953.

## West Germany: Imports of Unmanufactured Tobacco, First Half of 1954

German imports of unmanufactured tobacco increased from the 53 million pounds imported in the first half of 1953 to 62 million pounds for the first half of 1954. Imports from the United States rose from 22.3 million to 26.2 million pounds during the same periods.

A substantially larger amount of Greek tobacco was taken this first half; 13.0 million pounds compared with 8.5 million pounds taken during the period January-June 1953.

West Germany: Imports of Unmanufactured Tobacco January-June 1953-54

| Country of Origin | January-June 1953 | January-June 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| United States | 22,251 | 26,229 |
| Greece | 8,506 | 13,048 |
| Turkey | 6,209 | 6,508 |
| Indonesia | 2,942 | 3,621 |
| Brazil | 4,827 | 5,041 |
| Columbia | 2,093 | 2,779 |
| Dominican Republic | 1,219 | 1,814 |
| Other | 4,990 | 3,041 |
| Total | 53,037 | 62,081 |

## 1953 Turkish Tobacco Crop Moves into Export Channels

Nearly all of the 1953 Turkish tobacco crop of approximately 249 million pounds has been delivered to the merchants, export buyers and the Monopoly. This tobacco which was manipulated during the spring and summer is now ready for export, which began on a substantial scale during late September. Quality is said to be better than usual and a strong export market is expected.

Izmir tobacco interests estimate that there are 110 million pounds of American grade Aegean tobacco available which will move readily at an average price of 64-65 cents per pound. Estimated sales are 55 million pounds to United States buyers, 11 million to England, 11 million to West Germany, 4.4 million to France and 11 million to Soviet Bloc countries with smaller amounts to Switzerland, Belgium and Sweden. In September, purchases of 1953 tobacco by East Germany were heavy with considerable advance buying from the 1954 crop.

Quality of the 1954 crop is reported to be good to excellent. Production in the Aegean area is estimated at 15-20 percent under last year's crop but output in other tobacco-producing areas is estimated to be about the same as 1953. The 1954 crop in the Izmir district is estimated at about 116 million pounds. Forward buying of the 1954 crop is reported to be on a larger scale than usual--apparently as a result of tightening credit and the growers' need for immediate cash. Prices of 40 to 45 cents per pound are reportedly being paid for unmanipulated 1954 tobacco to be delivered when the market officially opens in January.

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FT 44-54 December 3, 1954

# U. S. TOBACCO EXPORTS IN SEPTEMBER 1954 UP SEASONALLY BUT ONE-THIRD BELOW YEAR AGO

United States exports of unmanufactured tobacco in September 1954 totaled 45.9 million pounds valued at $33.0 million. This was 18.6 million pounds above August exports but about 33.4 percent below September 1953.

Exports of flue-cured tobacco were 41.1 million pounds in September compared with 63.4 million pounds in September 1953, a 35.1 percent decrease. Movement of flue-cured tobacco to market in the early part of the current season, particularly in South Carolina, was much slower than last year. Also, the quality of the leaf produced this year in the Georgia-Florida and South Carolina areas was below that for 1953, and this affected purchases for export. Since September movement primarily would include tobacco from the Georgia-Florida and South Carolina belts, these circumstances would have affected exports for the month adversely. Increased movement in subsequent months is expected to more than make up for the decline. Exports of Burley, Virginia fire-cured, Dark-fired Kentucky-Tennessee, One-Sucker tobacco and Cigar Filler decreased in September 1954 compared with the same period in 1953. Most other types showed increases.

In the first nine months of the current year, total exports of unmanufactured tobacco at 256.1 million pounds, were 24.6 percent below the same period last year. Exports of flue-cured tobacco were 30.7 percent lower during this period. Reduced shipments to the United Kingdom again account for a large part of the decrease (54.9 million pounds in the first nine months of 1954 compared with 116.2 million pounds in the same period in 1953, a 52.8 percent decrease).

Exports of Burley tobacco increased in the first nine months of 1954 with shipments to Mexico, the Netherlands, Belgium and Luxembourg, France, West Germany, Portugal and Italy accounting for 17.7 million pounds out of a total of 23.7 million pounds for the period. France has more than doubled her takings of Burley tobacco in 1954, taking 1.4 million pounds for the first nine months compared with 707,000 pounds for the entire year in 1953. On the other hand, Sweden which took 1.4 million pounds for the entire year in 1953, has taken no Burley thus far in 1954.

Exports of Dark-fired Kentucky-Tennessee increased moderately in the January-September 1954 period over the same period in 1953. Exports to the Netherlands, West Germany and French West Africa fell off. Exports to France increased sharply from 1.7 million pounds for the first nine months of 1953 to 5.7 million pounds for the same period in 1954. Exports to Switzerland also increased from 990 thousand pounds in 1953 to 1.1 million pounds in 1954. Exports of Maryland tobacco decreased about 7.3 percent for the first nine months of 1954 over the same period in 1953. Switzerland took 4.4 million pounds for this period in 1953 compared with 3.7 million pounds in 1954. Exports of most other types decreased. The 69.6 percent decrease in exports of Cigar Filler in the first nine months of 1954 over the same period in 1953 was largely due to greatly reduced shipments to Indochina (110 thousand pounds in 1954, compared with 264 thousand pounds in 1953) and to Algeria, which has taken no Cigar Filler in 1954 compared with 85,000 pounds in 1953.

Exports of U. S. Unmanufactured Tobacco September 1954
January-September 1954 with Comparisons

(Export Weight)

| Type | September | | Percent Change | January-September | | Percent Change |
|---|---|---|---|---|---|---|
| | 1953 | 1954 | | 1953 | 1954 | |
| | 1,000 pounds | 1,000 pounds | | 1,000 pounds | 1,000 pounds | |
| Flue-Cured | 63,388 | 41,128 | - 35.1 | 285,339 | 197,736 | - 30.7 |
| Burley | 1,188 | 1,127 | - 5.1 | 18,547 | 23,718 | + 27.9 |
| Virginia Fire-Cured | 477 | 234 | - 50.9 | 2,682 | 2,675 | - .3 |
| Dark-Fired Ky-Tenn | 1,618 | 588 | - 63.7 | 14,058 | 15,214 | + 8.2 |
| Maryland | 827 | 1,299 | + 57.0 | 6,337 | 5,877 | - 7.3 |
| Green River | 1 | 23 | +2,200.0 | 1,327 | 1,393 | + 5.0 |
| One-Sucker | 120 | 9 | - 92.5 | 773 | 702 | - 9.2 |
| Cigar Wrapper | 272 | 410 | + 50.7 | 2,953 | 2,517 | - 14.8 |
| Cigar Binder | 140 | 177 | + 26.4 | 2,369 | 1,127 | - 52.4 |
| Cigar Filler | 56 | - | 0 | 520 | 158 | - 69.6 |
| Other | 747 | 857 | + 14.7 | 4,891 | 5,026 | + 2.8 |
| Total | 68,834 | 45,852 | - 33.4 | 339,796 | 256,143 | - 24.[illegible] |
| Declared value, million dollars | 46.6 | 33.0 | - 29.2 | 220.1 | 167.1 | - 24.1 |

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

Exports of tobacco products, valued at 5.0 million, were about 21.9 percent lower in September 1954 than in the same month last year. All products showed decreases ranging from 20 to 33 percent.

Exports of cigars and cheroots and chewing tobacco and snuff were higher in the January-September 1954 period than in the corresponding period in 1953, but exports of cigarettes and smoking tobacco in packages and bulk were lower.

Exports of U. S. Tobacco Products, September 1954, with Comparisons

| Class of Products | September 1953 | September 1954 | Percent Change | Jan-September 1953 | Jan-September 1954 | Percent Change |
|---|---|---|---|---|---|---|
| Cigars and Cheroots (1,000 pieces) | 752 | 601 | - 20.1 | 4,343 | 6,075 | + 39.9 |
| Cigarettes (million pieces) | 1,535 | 1,200 | - 21.8 | 12,413 | 11,253 | - 9.3 |
| Chewing Tobacco and Snuff (1,000 pounds) | 256 | 172 | - 32.8 | 1,091 | 1,340 | + 22.8 |
| Smoking Tobacco in Packages (1,000 pounds) | 67 | 50 | - 25.4 | 509 | 404 | - 20.6 |
| Smoking Tobacco in Bulk (1,000 pounds) | 544 | 431 | - 20.8 | 3,492 | 3,113 | - 10.9 |
| Declared Value (million dollars) | 6.4 | 5.0 | - 21.9 | 48.5 | 45.6 | - 6.0 |

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
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FT 45-54

December 10, 1954

# EL SALVADOR: PRODUCTION, IMPORTS AND CONSUMPTION OF TOBACCO

## Summary

Production of tobacco in El Salvador in the 1954-55 season is expected to show a considerable increase over previous years. Production and sale of factory-made cigarettes declined in 1954 due chiefly to a rise in prices resulting from increased taxes and unfavorable economic conditions. Imports of leaf tobacco, especially from the United States, are expected to decline.

## Production

The area planted for the 1954-55 crop is estimated at 3,840 acres, an increase of almost 50 percent from the poor crop harvested this year (1954). Almost 75 percent of the acreage is flue-cured tobacco, 9 percent is burley and the remainder is dark air/sun-cured. This estimate for air-cured tobacco includes only that which is to be purchased by the cigarette manufacturing company in El Salvador and does not include estimates for the dark air and sun-cured tobacco produced in small plots throughout the country and used by the numerous home enterprises for the production of cigars and cigarettes. No data are available on the area or production of this tobacco.

The present forecast of the 1954-55 production of tobacco for the manufacture of cigarettes is 1,832,000 pounds, an increase of 73 percent from the 1953-54 output. Flue-cured tobacco for harvest in 1955 is forecast at 1,188,000 pounds or 65 percent of total output of all kinds of leaf. Burley production is forecast at 239,000 pounds or 13 percent of total production with other air-cured tobacco estimated at 405,000 pounds or 22 percent of the total. As compared to the previous crop, the estimated 1955 production indicates that the greatest poundage increase is expected in flue-cured. However, burley output is expected to be more than five times larger, and "other air-cured" well over twice as large as they were this year.

Tobacco seed is usually sown in beds in June or July and is transplanted to the field in August and September, but may run as late as October. Harvesting of the first leaves begins about two and one-half months after transplanting.

El Salvador: Estimated production of tobacco entering into factory products, 1954-55 with comparisons

| Kind | 1947-51 | 1952-53 | 1953-54 | 1954-55 1/ |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-cured | 646 | 1,067 | 839 | 1,188 |
| Burley | 2/ | 97 | 44 | 239 |
| Other air-cured | 477 | 319 | 175 | 405 |
| Total | 1,123 | 1,483 | 1,058 | 1,832 |

1/ Forecast.
2/ Included in other air-cured.

All of the cigarette tobacco produced locally as well as that imported is purchased by Cigarreria Morazan Sucs., S.A. (BAT subsidiary). This company is largely responsible for domestic production of cigarette leaf. It distributes seedlings and makes interest-free loans to growers, signs purchase contracts for production prior to planting and has increased the relative prices of better grades in an effort to improve quality.

Production of tobacco in the last few years has been smaller than requirements of the cigarette industry in spite of efforts made to increase output of domestic leaf. Inadequate supplies of seedlings, largely because of damage by heavy rainfall and disease to seed beds, have limited the area planted to tobacco. This season, however, the company indicated above expanded its own seed beds and distributed plants to farmers, whose seed beds were damaged and whose production of plants fell below expectations. The company has also encouraged the use of fertilizer, and sales to farmers this year have been more than double the total of last year.

## Imports

Although the population of El Salvador is only two million, the imports and consumption of tobacco per capita are fairly high. Most of the unmanufactured tobacco imported by El Salvador is dark types from Honduras with flue-cured from the U. S. accounting for practically all of the remainder.

Imports of United States flue-cured tobacco have increased for several years, but reports indicate a decline in 1954 with the expectation of a further decrease in 1955. Approximately 610,000 pounds of leaf tobacco, almost all of which has been flue-cured, have been taken annually from the United States in the 4-year period immediately prior to 1954. The decline in imports is expected partly as a result of a decrease in sales of machine-made cigarettes, caused primarily by an increase in taxes of four centavos (1.6 U. S. cents) per package imposed at the end of December 1953. In 1953, a total of 807 millio cigarettes were manufactured, an increase of 8 percent over 1952 and 48 percent more than the 1947-51 average. It is estimated that the 1954 output will total only 720 million cigarettes.

Most of the dark tobacco is used in home-made cigars and cigarettes, but in 1954 some dark leaf was reported as imported for use in the manufacture of cigarettes.

El Salvador: Imports of leaf tobacco by country of origin, 1947-53

| Country | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | Jan.-Sept. 1954 |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United States | 349 | 509 | 551 | 618 | 606 | 610 | 609 | 411 |
| Honduras | 1,747 | 2,203 | 1,575 | 1,869 | 2,796 | 2,452 | 2,766 | 2/ |
| Other | 1/ | 1/ | 1/ | - | - | 16 | - | 2/ |
| Total | 2,096 | 2,712 | 2,126 | 2,487 | 3,402 | 3,078 | 3,375 | 2/ |

1/ Less than 500 pounds.
2/ Not available.

## Consumption

During the first 8 months of 1954, sales of cigarettes have averaged approximately 12 percent below sales in the previous year. The reduction is even more marked in view of the fact that for a number of years sales have been steadily increasing at about five percent per year. Average per capita income is low and a relatively small change in level of economic activity and income is soon reflected in commercial sales of tobacco products.

Developments in the domestic coffee industry contributed to the decrease in cigarette sales during 1954. The production and exports of coffee are very important to the economy of El Salvador accounting for a high proportion of total employment. As a result of the small 1953-54 coffee crop, the number of workers employed for coffee picking was smaller than normal; thereby reducing purchasing-power of the working class. The increased prices of coffee in the first half of 1954 induced coffee growers to hire extra workers to carry out improvements on their plantation, and for a time cigarette sales rose, but later in the year (July), when the prices of coffee fell, growers suspended many of their projects which decreased employment and contributed to a downturn in cigarette sales. Normally, cigarette sales increase when coffee-picking begins in October. The crop being harvested (beginning this October) is expected to be large and, if coffee production and prices stabilize at fairly high levels, cigarette sales are likely to resume the upward trend which has been interrupted by the increased price of cigarettes (due to the tax rise) and unfavorable economic conditions in the country resulting from the coffee situation.

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FT 46-54 December 17, 1954

# UNITED STATES EXPORTS AND IMPORTS OF UNMANUFACTURED TOBACCO JANUARY-SEPTEMBER 1954 WITH COMPARISONS

Exports of unmanufactured tobacco for the first nine months of the current year were about 25 percent below those of the corresponding 1953 period.

Exports of Burley, Dark-fired Kentucky-Tennessee, Virginia Sun-cured, Green River and Black Fat tobacco showed moderate increases, but exports of all other types decreased, the decreases ranging from about one percent to 70 percent. Exports of flue-cured tobacco were down about 31 percent.

## Flue-Cured

Exports of flue-cured tobacco were 197.7 million pounds for January-September 1954 compared with 285.3 million pounds for the same period in 1953. Reduced shipments to the United Kingdom again accounted for a large part of the decrease (54.9 million pounds in the first nine months of 1954 compared with 116.2 million pounds in the same period in 1953, about a 53 percent decrease). In the late spring of 1953, considerable quantities of tobacco, which normally would have moved to the United Kingdom in the fall of 1952, were exported under the provisions of an option purchase arrangement, thereby accounting in large measure for the increased exports to the United Kingdom in the January-September 1953 period. Other countries taking less flue-cured tobacco include most of the major importing countries of Europe and Asia. Substantial decreases were reflected in takings by Denmark, Ireland, the Netherlands, West Germany, Switzerland, Portugal, Thailand, Indochina, Indonesia and the Philippines. Exports very sharply decreased in this period to Yugoslavia which took 2.4 million pounds in the January-September 1953 period compared with 182 thousand pounds for the corresponding period in 1954. There were increased takings by Mexico, Sweden, Norway, Spain, India, Pakistan, Taiwan and New Zealand. The largest increase for this period was in exports to Finland (1.3 million pounds in 1953, compared with 5.1 million pounds for the January-September 1954 period).

Movement of flue-cured tobacco to market in the early part of the current season, particularly in South Carolina, was much slower than last year. Also, the quality of the leaf produced this year in the Georgia-Florida and South Carolina areas was below that for 1953, and this affected purchases for export. Since September movement primarily would include tobacco from the Georgia-Florida and South Carolina belts, these circumstances would have affected exports adversely. Increased movement in subsequent months is expected to more than make up for the decline.

## Burley

Exports of Burley tobacco increased about 28 percent in the first nine months of 1954 with shipments to Mexico, the Netherlands, Belgium and Luxembourg, France, West Germany, Portugal and Italy accounting for 17.7 million pounds out of a total of 23.7 million pounds for the period. France has more than doubled its takings of Burley in 1954, taking 1.4 million pounds for the first nine months compared with 707,000 pounds for the entire year in 1953. There were increased takings by Mexico, the Netherlands, Finland, Portugal, Hong Kong and Australia. Exports to Italy increased in this period to 2.4 million pounds compared with 582,000 pounds for the January-September 1953 period. Countries taking less Burley for this period include Denmark, Belgium and Luxembourg, West Germany, Austria, Switzerland, the Philippines and Egypt.

## Dark-fired Kentucky-Tennessee

Exports of Dark-fired Kentucky-Tennessee increased about 8 percent in the January-September 1954 period over the same period in 1953. Exports to the Netherlands, West Germany and French West Africa fell off. Exports to France increased sharply from 1.7 million pounds for the first nine months of 1953 to 5.7 million pounds for the same period in 1954. Exports to Switzerland also increased, rising from 990 thousand pounds in 1953 to 1.1 million pounds in 1954. There were decreased shipments to Ireland, Italy, the Gold Coast and Egypt. There were no shipments of Dark-fired Kentucky-Tennessee tobacco to Spain thus far in 1954 compared with 1.8 million pounds for the first nine months of 1953.

## Virginia Fire-cured and Sun-cured

Exports of Virginia fire-cured tobacco decreased slightly with the United Kingdom, West Germany, Austria, and Australia taking less in 1954 than in 1953. There were increased takings by Sweden, Norway, the Netherlands, Switzerland and New Zealand. Exports of Virginia sun-cured tobacco during January-September 1954, totaling 49,000 pounds, went to Honduras and Norway. Exports during January-September 1953, totaling 42,000 pounds, went to West Germany, Switzerland and Algeria.

## Maryland

Exports of Maryland tobacco fell about 7.3 percent in the first nine months of 1954 from the same 1953 period. Switzerland took 4.4 million pounds in 1953 compared with 3.7 million pounds in 1954. There were also decreases in exports to the Netherlands, Yugoslavia and French Morocco. Increases were noted in exports to Denmark, Belgium and Luxembourg, West Germany, Spain and Tunisia, which took 279,000 pounds in the January-September 1954 period compared with no exports in the corresponding 1953 period.

## Green River, One Sucker

Green River tobacco exports showed a 5 percent increase for the January-September 1954 period, shipments of 198,000 pounds to France accounting for the increase. France took no Green River tobacco for the corresponding period in 1953. Exports to the United Kingdom declined about 6 percent for the first nine months of this year.

Exports of One Sucker tobacco decreased slightly (about 9 percent) for January-September 1954. Nigeria took only 209,000 pounds for this period compared with 470,000 pounds in the like 1953 period. On the other hand, France which took no One Sucker tobacco during the entire year 1953, took 320,000 pounds in the first three quarters of 1954.

## Black Fat

Exports of Black Fat totaled 3.0 million pounds in the first nine months of 1954 compared to 2.8 million pounds for the same period in 1953. The largest increase was reflected in takings by Nigeria (1.7 million pounds compared to 1.5 million pounds in 1953). There were decreases in exports to the Gold Coast and to Western Portuguese Africa.

## Cigar Leaf

Exports of all cigar leaf declined substantially during the January-September 1954 period over the same period in 1953. There were no exports of cigar wrapper and cigar binder to East Germany during 1954 compared with exports totaling 1.3 million pounds in the first nine months of 1953. Exports of cigar wrapper also decreased to most other countries, although France, which took none in the 1953 period, took 228,000 pounds. The sharpest decrease in exports of cigar binder is reflected in the East Germany figure mentioned above. Other countries taking less binder include the Netherlands, and Belgium and Luxembourg. Exports of cigar filler fell about 70 percent in the first nine months of 1954 from the corresponding period in 1953. This was largely due to greatly reduced shipments to Indochina (110 thousand pounds in 1954 compared with 264,000 pounds in 1953), to Algeria, which has taken no cigar filler in 1954 compared with 85,000 pounds in 1953 and to French Equatorial Africa, which took 66,000 pounds in 1953 and none in 1954.

## Perique, Trimmings, Stems and Scrap

Exports of Perique dropped about 28 percent in the first nine months of 1954 compared with the same period in 1953, because of a lack of shipments to Norway. Exports of Trimmings, Stems and Scrap also dropped about 5 percent. However, exports increased to Sweden, the Netherlands, Jordan and Spain. Tangier took only 97,000 pounds in 1954 compared with 906,000 pounds in 1953.

United States: Exports of unmanufactured tobacco by types, January-September 1954 with comparisons

| Type | Calendar Years | | | Jan-Sept. 1/ | | Percent Change |
|---|---|---|---|---|---|---|
| | Average 1947-51 | 1952 1/ | 1953 1/ | 1953 | 1954 | Jan-Sept. 1953-54 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | percent |
| Flue-cured | 388,078 | 319,270 | 444,306 | 285,339 | 197,736 | - 30.7 |
| Burley | 32,865 | 26,871 | 25,007 | 18,547 | 23,718 | + 27.9 |
| Ky-Tenn fire-cured | 24,591 | 21,752 | 19,485 | 14,058 | 15,214 | + 8.2 |
| Virginia fire-cured | 6,046 | 4,860 | 4,276 | 2,682 | 2,675 | - .3 |
| Virginia sun-cured 2/ | - | 277 | 42 | 42 | 49 | + 16.7 |
| Maryland | 7,349 | 5,807 | 8,135 | 6,337 | 5,877 | - 7.3 |
| Green River | 1,726 | 2,260 | 1,829 | 1,327 | 1,393 | + 5.0 |
| One Sucker | 3,063 | 1,535 | 1,023 | 773 | 702 | - 9.2 |
| Black Fat | 4,669 | 3,204 | 3,881 | 2,762 | 3,004 | + 8.8 |
| Cigar Leaf: | | | | | | |
| Wrapper 2/ | - | 3,061 | 3,901 | 2,953 | 2,517 | - 14.8 |
| Binder 2/ | - | 2,848 | 3,100 | 2,369 | 1,127 | - 52.4 |
| Filler 2/ | - | 853 | 587 | 520 | 158 | - 69.6 |
| Total Cigar Leaf | 2/ 9,770 | 6,762 | 7,588 | 5,842 | 3,802 | - 34.9 |
| Perique | 79 | 60 | 66 | 50 | 36 | - 28.0 |
| Trimmings, Stems & Scraps | 8,116 | 3,622 | 3,027 | 2,036 | 1,937 | - 4.9 |
| Total | 486,352 | 396,280 | 518,665 | 339,796 | 256,143 | - 24.6 |

1/ Preliminary. 2/ Class established January 1952.

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

### UNITED STATES: Exports of unmanufactured tobacco by type and principal countries of destination, January-September 1953 and 1954

FLUE-CURED

| Country | Jan.-Sept. 1953 | Jan.-Sept. 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| Mexico | 1,221 | 1,433 |
| El Salvador | 450 | 411 |
| Uruguay | 1,011 | 1,059 |
| Sweden | 3,201 | 3,562 |
| Norway | 3,064 | 3,393 |
| Denmark | 3,993 | 3,740 |
| United Kingdom | 116,241 | 54,908 |
| Ireland | 9,278 | 6,457 |
| Netherlands | 21,346 | 18,934 |
| Belgium & Luxembourg | 4,386 | 3,630 |
| France | 25 | - |
| West Germany | 36,268 | 28,523 |
| Austria | 1,349 | 1,106 |
| Switzerland | 2,242 | 1,901 |
| Finland | 1,286 | 5,056 |
| Spain | 881 | 1,432 |
| Portugal | 3,635 | 2,442 |
| Malta | 921 | 519 |
| Italy | 4,409 | 1,011 |
| Yugoslavia | 2,356 | 182 |
| India | 833 | 1,006 |
| Pakistan | 1,378 | 1,597 |
| Ceylon | 761 | 560 |
| Thailand | 4,753 | 3,216 |
| Indochina | 2,284 | 1,230 |
| Indonesia | 9,495 | 7,745 |
| Philippines | 16,221 | 12,108 |
| Hong Kong | 3,109 | 2,250 |
| Taiwan | 968 | 1,003 |
| Japan | 5,859 | 4,763 |
| Australia | 9,076 | 8,751 |
| New Zealand | 4,822 | 5,707 |
| Egypt | 3,184 | 3,125 |
| Nigeria | 997 | 624 |
| British East Africa | 648 | 398 |
| Other | 3,388 | 3,954 |
| Total | 285,339 | 197,736 |

BURLEY

| Country | Jan.-Sept. 1953 | Jan.-Sept. 1954 |
|---|---|---|
| | 1,000 pounds | 1,000 pounds |
| Mexico | 1,433 | 3,459 |
| Norway | 432 | 434 |
| Denmark | 433 | 216 |
| Netherlands | 528 | 1,684 |
| Belgium and Luxembourg | 2,018 | 1,477 |
| France | 707 | 1,425 |
| West Germany | 3,662 | 3,137 |
| Austria | 850 | 365 |
| Switzerland | 1,007 | 593 |
| Finland | 323 | 661 |
| Portugal | 2,500 | 4,087 |
| Italy | 582 | 2,410 |
| Philippines | 955 | 609 |
| Hong Kong | 288 | 499 |
| Australia | 13 | 63 |
| Egypt | 914 | 567 |
| Other | 1,902 | 2,032 |
| Total | 18,547 | 23,718 |

DARK-FIRED KENTUCKY-TENNESSEE

| Country | Jan.-Sept. 1953 | Jan.-Sept. 1954 |
|---|---|---|
| Peru | - | 110 |
| Iceland | - | 68 |
| Sweden | - | 108 |
| Denmark | 371 | 560 |
| United Kingdom | 297 | 420 |
| Ireland | 525 | 280 |
| Netherlands | 3,117 | 2,073 |
| Belgium and Luxembourg | 284 | 541 |
| France | 1,720 | 5,727 |
| West Germany | 444 | 388 |
| Switzerland | 990 | 1,134 |
| Azores | 73 | 43 |
| Spain | 1,851 | - |
| Portugal | 162 | 143 |

- Continued -

UNITED STATES: Exports of unmanufactured tobacco by type and principal countries of destination, January-September 1953 and 1954 (Continued)

| Country | Jan.-Sept. 1953 | Jan.-Sept. 1954 |
|---|---|---|
| DARK-FIRED KENTUCKY-TENNESSEE | | |
| | 1,000 pounds | 1,000 pounds |
| Italy | 623 | 419 |
| Indochina | 72 | 51 |
| Indonesia | 465 | 468 |
| New Zealand | 128 | 173 |
| Algeria | 67 | 124 |
| Cameroon | 157 | 374 |
| French West Africa | 591 | 572 |
| Gold Coast | 283 | 212 |
| Egypt | 134 | 75 |
| Other | 1,704 | 1,151 |
| Total | 14,058 | 15,214 |
| VIRGINIA FIRE-CURED | | |
| Trinidad & Tobago | 152 | - |
| Sweden | 92 | 233 |
| Norway | 973 | 978 |
| United Kingdom | 279 | 140 |
| Ireland | 34 | 56 |
| Netherlands | 122 | 248 |
| West Germany | 278 | 148 |
| Austria | 215 | 64 |
| Switzerland | 174 | 218 |
| Australia | 158 | 112 |
| New Zealand | 130 | 209 |
| Other | 75 | 269 |
| Total | 2,682 | 2,675 |
| GREEN RIVER | | |
| United Kingdom | 1,026 | 967 |
| Netherlands | 259 | 30 |
| Belgium & Luxembourg | 1 | 131 |
| France | - | 198 |
| Liberia | 25 | 30 |
| Other | 16 | 37 |
| Total | 1,327 | 1,393 |

| Country | Jan.-Sept. 1953 | Jan.-Sept. 1954 |
|---|---|---|
| VIRGINIA SUN-CURED | | |
| | 1,000 pounds | 1,000 pounds |
| Honduras | - | 1 |
| Norway | - | 48 |
| West Germany | 34 | - |
| Switzerland | 6 | - |
| Algeria | 2 | - |
| Other | - | - |
| Total | 42 | 49 |
| MARYLAND | | |
| Denmark | 20 | 25 |
| Netherlands | 274 | 179 |
| Belgium and Luxembourg | 207 | 285 |
| West Germany | 160 | 405 |
| Switzerland | 4,374 | 3,665 |
| Spain | 226 | 290 |
| Yugoslavia | 749 | 589 |
| French Morocco | 202 | 111 |
| Tunisia | - | 279 |
| Other | 125 | 49 |
| Total | 6,337 | 5,877 |
| TRIMMINGS, STEMS & SCRAP | | |
| Sweden | 242 | 412 |
| Norway | 245 | 238 |
| Denmark | 115 | 109 |
| Netherlands | 19 | 200 |
| West Germany | 141 | 65 |
| Spain | - | 300 |
| Jordan | 51 | 85 |
| French Morocco | - | 204 |
| Tangier | 906 | 97 |
| Canary Islands | 154 | 48 |
| Other | 163 | 179 |
| Total | 2,036 | 1,937 |

UNITED STATES: Exports of unmanufactured tobacco by type
and principal countries of destination,
January-September 1953 and 1954
(Continued)

### ONE SUCKER

| Country | Jan.-Sept. | |
|---|---|---|
| | 1953 | 1954 |
| | 1,000 pounds | 1,000 pounds |
| Trinidad & Tobago | 28 | 13 |
| Netherlands | 47 | - |
| Belgium & Luxembourg | 143 | 121 |
| France | - | 320 |
| Yugoslavia | 55 | - |
| Canary Islands | - | 26 |
| Nigeria | 470 | 209 |
| Other | 30 | 13 |
| Total | 773 | 702 |

### BLACK FAT

| | | |
|---|---|---|
| Bahamas | 28 | 13 |
| Netherlands Antilles | 28 | 24 |
| Canary Islands | 34 | 77 |
| Cameroon | 17 | 70 |
| French West Africa | 375 | 467 |
| Gold Coast | 689 | 568 |
| Nigeria | 1,480 | 1,727 |
| Western Portuguese Africa | 94 | 18 |
| Other | 17 | 40 |
| Total | 2,762 | 3,004 |

### PERIQUE

| | | |
|---|---|---|
| Norway | 20 | - |
| United Kingdom | 24 | 33 |
| Other | 6 | 3 |
| Total | 50 | 36 |

### CIGAR BINDER

| | | |
|---|---|---|
| Canada | 14 | 74 |
| Sweden | 1 | 166 |
| Denmark | 54 | 78 |
| Netherlands | 252 | 76 |
| Belgium & Luxembourg | 359 | 161 |
| West Germany | 315 | 336 |
| East Germany | 1,162 | - |
| Austria | 142 | 183 |
| Australia | 6 | 25 |
| Other | 64 | 28 |
| Total | 2,369 | 1,127 |

### CIGAR WRAPPER

| Country | Jan.-Sept. | |
|---|---|---|
| | 1953 | 1954 |
| | 1,000 pounds | 1,000 pounds |
| Canada | 322 | 301 |
| Brazil | 78 | 36 |
| Denmark | 131 | 71 |
| Netherlands | 172 | 121 |
| Belgium & Luxembourg | 272 | 304 |
| France | - | 228 |
| West Germany | 1,637 | 1,088 |
| East Germany | 143 | - |
| Canary Islands | 38 | 70 |
| Other | 160 | 298 |
| Total | 2,953 | 2,517 |

### CIGAR FILLER

| | | |
|---|---|---|
| Canada | 60 | - |
| Netherlands | - | 31 |
| Gibraltar | 38 | 8 |
| Indochina | 264 | 110 |
| Algeria | 85 | - |
| French Equatorial Africa | 66 | - |
| Other | 7 | 9 |
| Total | 520 | 158 |

### TOTAL CIGAR LEAF

| | | |
|---|---|---|
| Canada | 396 | 372 |
| Brazil | 78 | 36 |
| Sweden | 15 | 172 |
| Denmark | 185 | 149 |
| Netherlands | 424 | 222 |
| Belgium and Luxembourg | 631 | 452 |
| West Germany | 1,959 | 1,418 |
| East Germany | 1,305 | - |
| Austria | 178 | 204 |
| Gibraltar | 38 | 8 |
| Indochina | 274 | 118 |
| Australia | 6 | 27 |
| Algeria | 113 | 26 |
| Canary Islands | 38 | 66 |
| French Equatorial Africa | 66 | - |
| Other | 136 | 531 |
| Total | 5,842 | 3,801 |

## Imports of Unmanufactured Tobacco

Total imports of unmanufactured tobacco for the first nine months of 1954 increased slightly (about 1 percent) over imports for the same period in 1953, (80.9 million pounds in 1954 compared with 80.0 million pounds in 1953).

### Cigarette Leaf

Imports of cigarette leaf during January-September 1954 increased by slightly more than 2 percent over those of the corresponding period in 1953. Turkey, as usual, was the largest supplier this year, furnishing 42.5 million pounds. Greece supplied 11.8 million this year, up slightly from January-September 1953. Increases also occurred in imports from Italy and Yugoslavia. Imports from Syria were about 8 percent below those of a year ago.

### Cigar Leaf (filler)

Imports of cigar leaf (filler) decreased by 411,000 pounds in the first nine months of 1954 from the same period in 1953, Cuba, the principal source, supplying only 10.7 million pounds in 1954 compared with 10.9 million pounds in 1953.

### Cigar Leaf (wrapper)

Imports of cigar leaf (wrapper) decreased about 7 percent in the January-September 1954 period over the same period a year ago because of the absence of imports from the Philippines. Imports from Cuba and Indonesia increased slightly.

### Stems and Scrap

Total imports of stems and scrap were about the same as the year before in the first nine months of 1954. Cuba, the largest supplier shipped 7.7 million pounds compared with 6.8 million pounds in 1953. Imports from the Philippines fell about 46 percent below the January-September 1953 period.

## UNITED STATES: Imports of unmanufactured tobacco by principal countries of origin January-September 1953 and 1954 with comparisons

| Type and Country of Origin | Average | | | Jan.-Sept. 1/ | |
|---|---|---|---|---|---|
| | 1947-51 | 1952 1/ | 1953 1/ | 1953 | 1954 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| **Cigarette Leaf:** | | | | | |
| Turkey | 46,848 | 54,954 | 56,884 | 42,916 | 42,461 |
| Greece | 9,327 | 14,541 | 14,318 | 10,944 | 11,801 |
| Italy | 237 | 810 | 1,210 | 774 | 1,413 |
| Syria | 3,838 | 3,897 | 3,294 | 2,506 | 2,292 |
| Bulgaria | 2,165 | 7 | - | - | 33 |
| Soviet Union | 2,783 | 2/ | - | - | - |
| Southern Rhodesia | 1,154 | 561 | 259 | 172 | 3/ 111 |
| Yugoslavia | 411 | 765 | 1,390 | 1,100 | 1,685 |
| Other Countries | 415 | 383 | 619 | 372 | 383 |
| Total | 67,178 | 75,918 | 77,974 | 58,784 | 60,179 |
| **Cigar Leaf: (filler, stemmed & unstemmed)** | | | | | |
| Cuba | 16,477 | 13,874 | 14,172 | 10,969 | 10,709 |
| Philippines | 279 | 2,093 | 532 | 201 | 34 |
| Other Countries | 11 | 21 | 30 | 22 | 38 |
| Total | 16,767 | 15,988 | 14,734 | 11,192 | 10,781 |
| **Cigar Leaf: (wrapper)** | | | | | |
| Cuba | 285 | 371 | 420 | 327 | 378 |
| Indonesia 4/ | 804 | 758 | 445 | 310 | 316 |
| Other Countries | 21 | - | 100 | 113 | 1 |
| Total | 1,110 | 1,129 | 965 | 750 | 695 |
| **Scraps and Stems:** | | | | | |
| Cuba | 5,312 | 8,129 | 8,969 | 6,837 | 7,723 |
| Philippines | 309 | 1,219 | 2,303 | 2,070 | 1,125 |
| United Kingdom | 105 | 417 | 465 | 375 | 441 |
| Other Countries | 687 | 58 | 19 | 19 | 38 |
| Total | 6,413 | 9,823 | 11,756 | 9,301 | 9,327 |
| Total Imports | 91,468 | 102,858 | 105,429 | 80,027 | 80,982 |

1/ Preliminary.
2/ Less than 500 pounds.
3/ Effective July 1, 1954 Federation of Rhodesia and Nyasaland.
4/ Includes Indonesian tobacco re-shipped from the Netherlands.

Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

JAN 14
U. S. DEPARTMENT OF AGRICULTURE

FT 47-54

December 20, 1954

# ESTIMATED WORLD PRODUCTION OF LEAF TOBACCO HARVESTED IN CALENDAR YEAR 1954, WITH COMPARISONS 1/

## Summary

World production of leaf tobacco harvested in 1954 is estimated at 7,752 million pounds. This is almost 4 percent above the amount harvested in 1953 when U. S. output was decreased substantially by drought conditions and is about 495 million pounds greater than the 1947-51 average. The largest increases in production in 1954 as compared to 1953 were in the United States, Canada, Pakistan, India, Korea, Japan, Southern Rhodesia, Indochina, Cuba and Western Germany; while the greatest declines were in Turkey, Iran, Algeria, Italy and Argentina. Acreage in 1954 was about 2.6 percent above that of 1953 and the over-all average yield per acre this year was slightly higher than that of last year. The greatest increases in acreage for harvest in 1954 were in Greece, Brazil, Canada, Cuba, Korea, Colombia, Pakistan, and Indochina. There were relatively few decreases in area planted and most of the declines were small, but the largest reductions were in Iran, Turkey, Union of South Africa, Algeria, and Argentina.

## PRODUCTION BY AREAS

### North America

Production in 1954 is estimated at 2,618 million pounds, up about 173 million from 1953 and approximately 6.5 percent above the 1947-51 average. This is due chiefly to larger output in the United States, Canada, Cuba and Dominican Republic, but production was increased in all North American countries except El Salvador, Guatemala, Puerto Rico and Panama. The greatest increases in acreage were in Canada, Cuba, Honduras and Puerto Rico. The decreases in acreage were small and confined to the United States, Guatemala, and El Salvador. Due primarily to the continuing favorable price and general demand for cigar leaf, production of this kind of tobacco was stimulated in 1954 in tobacco producing islands of the Caribbean area, particularly Cuba and the Dominican Republic.

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1/ Does not include Manchuria. Data relative to the quantities of tobacco grown and consumed at home without entering commercial channels are not available in many countries. Farm sales weight is about 10 percent above the average dry weight, which is normally reported in export trade statistics.

## South America

The estimated production of 472 million pounds for South America in 1954 was only slightly below that of 1953 and was the second highest on record. All the decrease as compared to 1953 is due to smaller acreage and production in Argentina and Paraguay, which had decreases in production of 12 and 30 percent, respectively, from the previous year. Output in all except these two countries increased. Acreages were considerably larger in Brazil and Colombia, although in Colombia production increased much less than the 38 percent expansion in acreage as weather was unfavorable during the growing season. Production of Bahia cigar in Northern Brazil was well above that of 1953 when output was below normal due to severe drought conditions during the December 1952 - March 1953 period.

## Europe (including the U. S. S. R. )

Production in 1954 is estimated at 1,248 million pounds, almost the same as in 1953. Production for the Iron Curtain countries was estimated at 662 million pounds in 1954, about the same as in 1953, although little is known about the exact levels of output in these countries. A large increase of 11 million pounds (almost 25 percent) in Germany was almost offset by a decline of 10 million pounds in Italy - the latter due chiefly to dry weather. There was a large increase in acreage in Greece, but the rise in output was small due to drought conditions.

## Africa

The estimated production for 1954 is 313.7 million pounds, slightly below the output of last year, but 21 percent above the 1947-51 average of 258.5 million pounds.

The largest increase in production was reported in Southern Rhodesia, which is the most important tobacco producing country in Africa. Production there exceeded 120 million pounds, an increase of 14.6 million pounds from 1953 and more than four and one-half times as large as the 1935-39 average. Other countries reporting increased production include Tanganyika, Mozambique, and Nigeria. Output declined in Algeria, Nyasaland, Northern Rhodesia, Tunisia, and Union of South Africa, but in all of these, except the Union of South Africa, the 1954 production was still well above the 1947-51 average. The decline in the Union is believed to be only temporary as there has been a shift in kinds of leaf grown, and sufficient seed of the improved varieties have not been available to plant the acreages desired in the last two years.

## Asia

Total production in Asia (excluding Manchuria) in 1954 is estimated at 3,089 million pounds or about 4 percent above 1953 and over 5 percent above the 1947-51 average.

There were relatively large declines in output in Turkey and Iran, largely due to unfavorable weather conditions, with small decreases in Cyprus, Ceylon and Taiwan (Formosa), but output increased in all other countries. There were large increases in production in Pakistan, India, Japan, Korea and Indochina with small increases in a number of other areas. Combined production of India and Pakistan is still below the level reported in the 1935-39 period, but much of this is believed to be due to differences in methods of estimating production. While little is known in regard to Communist China, the most important tobacco-producing country in Asia, it is reported that 1954 tobacco acreage and production were slightly above 1953.

## Oceania

The estimated output of 1954 is 12.2 million pounds, a rise of 870,000 pounds as compared to 1953. Output increased about 1.44 million pounds in Australia, but declined 570,000 pounds in New Zealand.

Tobacco: Estimated production in specified countries, harvested in calendar year 1954 with comparisons, by types - farm sales weight

| Kinds | Average 1935-39 | Average 1947-51 | 1953 | 1954 |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-cured | 1,261,694 | 2,024,010 | 2,306,739 | 2,481,041 |
| Burley (light air-cured) | 338,752 | 608,960 | 639,945 | 659,150 |
| Other light air-cured | 121,074 | 128,504 | 136,018 | 128,463 |
| Light sun-cured | 680,667 | 741,910 | 684,360 | 712,436 |
| Dark air-cured | 3,105,681 | 2,616,930 | 2,563,569 | 2,664,918 |
| Dark sun-cured | 185,654 | 246,669 | 217,151 | 233,929 |
| Fire-cured | 162,489 | 151,958 | 110,251 | 116,782 |
| Oriental (Turkish) and Semi-Oriental | 649,639 | 727,302 | 807,527 | 755,715 |
| Total | 1/ 6,513,933 | 2/ 7,257,971 | 7,465,560 | 7,752,484 |

1/ Includes 226 thousand pounds for Cyprus and 8,057 thousand pounds for Iraq which are not identified by kind.

2/ Includes 11,728 thousand pounds for Iraq which is not identified by kind.

TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons - farm sales weight 1/

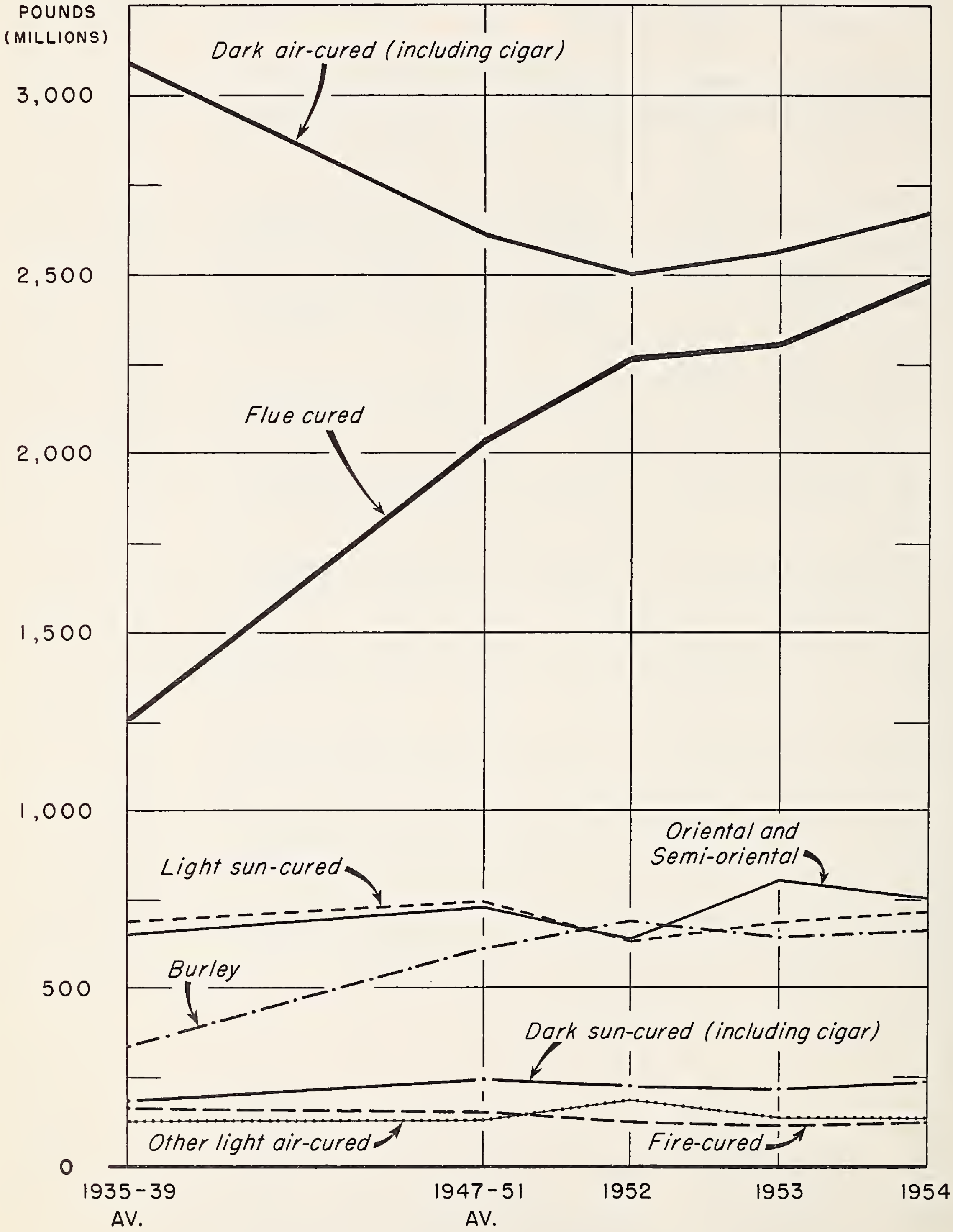
| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 69 | 113 | 101 | 132 | 1,103 | 1,144 | 1,377 | 1,364 | 76,556 | 129,445 | 139,190 | 180,000 |
| Costa Rica | 3/ | 3 | 3 | 3 | 3/ | 800 | 700 | 700 | 3/ | 2,281 | 2,000 | 2,110 |
| El Salvador | 1 | 3 | 3 | 3 | 700 | 467 | 430 | 408 | 4/ 750 | 1,113 | 1,483 | 1,058 |
| Guatemala | 5 | 7 | 7 | 7 | 376 | 590 | 599 | 510 | 1,892 | 3,920 | 4,255 | 3,449 |
| Honduras | 7 | 11 | 14 | 21 | 606 | 684 | 517 | 580 | 4/ 4,500 | 7,915 | 7,250 | 12,175 |
| Mexico | 51 | 90 | 79 | 79 | 750 | 882 | 1,120 | 1,160 | 38,200 | 79,425 | 88,438 | 92,230 |
| Nicaragua | 1 | 2 | 2 | 3 | 900 | 775 | 900 | 950 | 800 | 1,150 | 1,350 | 2,850 |
| Panama | 3/ | 2 | 2 | 2 | 3/ | 450 | 450 | 450 | 3/ | 720 | 720 | 720 |
| United States | 1,647 | 1,682 | 1,634 | 1,632 | 887 | 1,258 | 1,259 | 1,321 | 1,460,054 | 2,082,727 | 2,057,221 | 2,156,034 |
| Caribbean: | | | | | | | | | | | | |
| Cuba | 108 | 132 | 139 | 168 | 429 | 550 | 580 | 580 | 48,092 | 72,529 | 78,156 | 90,900 |
| Dominican Republic | 25 | 44 | 45 | 47 | 985 | 965 | 685 | 818 | 24,625 | 42,000 | 30,864 | 38,435 |
| Haiti | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 4/ 7,500 | 3/ | 3,350 |
| Jamaica | 3/ | 6 | 3/ | 2 | 3/ | 414 | 3/ | 390 | 3/ | 2,500 | 3/ | 778 |
| Puerto Rico | 44 | 35 | 36 | 40 | 673 | 769 | 976 | 840 | 29,393 | 26,921 | 34,325 | 34,140 |
| Total North America | 1,958 | 2,130 | 2,065 | 2,139 | - | - | - | - | 1,684,862 | 2,460,146 | 2,445,252 | 2,618,229 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 29 | 68 | 92 | 85 | 965 | 926 | 922 | 875 | 27,983 | 61,140 | 84,877 | 74,736 |
| Bolivia | 3 | 3 | 3 | 3 | 700 | 700 | 700 | 700 | 2,500 | 2,100 | 2,100 | 2,126 |
| Brazil | 250 | 337 | 398 | 433 | 811 | 692 | 730 | 685 | 202,703 | 233,120 | 291,305 | 296,018 |
| Chile | 9 | 9 | 7 | 8 | 1,846 | 1,670 | 1,743 | 1,707 | 16,618 | 14,719 | 11,951 | 13,161 |
| Colombia | 4/ 37 | 47 | 50 | 69 | 4/ 803 | 958 | 1,124 | 853 | 4/ 31,697 | 45,027 | 56,217 | 58,861 |
| Paraguay | 22 | 16 | 17 | 15 | 808 | 1,150 | 908 | 734 | 17,792 | 18,438 | 15,701 | 11,023 |
| Uruguay | 1 | 1 | 1 | 1 | 860 | 967 | 829 | 1,129 | 1,254 | 957 | 545 | 837 |
| Venezuela | 10 | 8 | 16 | 17 | 825 | 626 | 844 | 882 | 7,700 | 6,224 | 13,133 | 14,992 |
| Total South America | 361 | 489 | 584 | 631 | - | - | - | - | 308,247 | 381,725 | 475,829 | 471,754 |
| EUROPE: (Including U.S.S.R.) | | | | | | | | | | | | |
| Austria | 3/ | 3/ | 1 | 1 | 3/ | 3/ | 1,515 | 1,460 | 3/ | 3/ | 1,623 | 1,984 |
| Belgium | 6 | 5 | 5 | 4 | 2,500 | 1,924 | 1,838 | 2,076 | 16,431 | 9,432 | 9,041 | 8,378 |
| France | 44 | 70 | 70 | 71 | 1,676 | 1,557 | 1,650 | 1,650 | 72,995 | 109,070 | 103,475 | 104,000 |
| Germany, Western 5/ | 33 | 23 | 23 | 27 | 2,254 | 2,185 | 2,013 | 2,123 | 74,355 | 46,982 | 46,300 | 57,320 |
| Greece | 226 | 213 | 217 | 263 | 589 | 531 | 620 | 526 | 132,819 | 113,320 | 134,445 | 138,387 |
| Italy | 77 | 142 | 123 | 121 | 1,175 | 1,179 | 1,224 | 1,164 | 90,500 | 167,900 | 150,570 | 140,832 |
| Spain | 4/ 16 | 28 | 50 | 51 | 4/1,100 | 1,244 | 1,354 | 1,345 | 4/ 17,322 | 34,425 | 67,736 | 68,585 |
| Sweden | 1 | 1 | 6/ | 1 | 1,735 | 1,526 | 1,650 | 1,650 | 1,061 | 859 | 660 | 660 |
| Switzerland | 1 | 3 | 3 | 3 | 1,571 | 1,844 | 1,453 | 1,278 | 2,276 | 4,689 | 4,360 | 3,836 |
| Yugoslavia | 39 | 89 | 84 | 91 | 969 | 673 | 761 | 678 | 37,410 | 59,622 | 63,933 | 61,729 |
| Total Western Europe | 443 | 574 | 576 | 633 | - | - | - | - | 445,169 | 546,299 | 582,143 | 585,711 |
| Other Europe (Incl.U.S.S.R.)7/ | 711 | 750 | 781 | 781 | - | - | - | - | 736,231 | 671,449 | 665,200 | 662,300 |
| Total Europe | 1,154 | 1,324 | 1,357 | 1,414 | - | - | - | - | 1,181,400 | 1,217,748 | 1,247,343 | 1,248,011 |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| AFRICA: | | | | | | | | | | | | |
| Algeria | 56 | 75 | 86 | 78 | 691 | 595 | 740 | 678 | 38,667 | 44,671 | 65,119 | 52,905 |
| Belgian Congo | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 1,684 | 1,950 | 2,000 |
| Kenya | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 300 | 520 | 520 | 520 |
| Nyasaland | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 15,751 | 28,627 | 35,349 | 32,454 |
| Tanganyika | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ | 874 | 4,588 | 3,596 | 5,405 |
| Uganda | 4 | 6 | 8 | 9 | 375 | 445 | 471 | 420 | 1,500 | 2,671 | 3,770 | 3,780 |
| French Morocco | 1 | 1 | 5 | 5 | 1,040 | 1,027 | 1,123 | 979 | 704 | 1,278 | 5,618 | 4,894 |
| Madagascar | 19 | 12 | 19 | 20 | 764 | 642 | 507 | 460 | 14,164 | 7,190 | 9,632 | 9,259 |
| Mauritius | 6/ | 1 | 1 | 1 | 1,200 | 1,215 | 1,600 | 800 | 650 | 850 | 1,454 | 1,058 |
| Mozambique | 4/ 1 | 4 | 4 | 4 | 4/ 385 | 400 | 400 | 400 | 4/ 467 | 1.535 | 1,500 | 2,420 |
| Nigeria | 56 | 58 | 66 | 68 | 400 | 420 | 400 | 400 | 22 | 24,490 | 26,450 | 27,060 |
| Northern Rhodesia | 4 | 15 | 20 | 24 | 486 | 410 | 520 | 350 | 1,585 | 6,085 | 10,493 | 8,235 |
| Southern Rhodesia | 50 | 136 | 180 | 175 | 504 | 626 | 580 | 690 | 26,150 | 84,679 | 105,618 | 120,250 |
| Tunisia | 1 | 2 | 4 | 4 | 1,200 | 1,100 | 1,160 | 725 | 1,262 | 2,205 | 4,638 | 2,906 |
| Union of South Africa | 47 | 93 | 86 | 76 | 523 | 510 | 513 | 528 | 24,972 | 47,421 | 44,160 | 40,552 |
| Total Africa | 239 | 403 | 479 | 464 | - | - | - | - | 149,346 | 258,494 | 319,867 | 313,698 |
| ASIA: | | | | | | | | | | | | |
| Asia Minor: | | | | | | | | | | | | |
| Cyprus | 1 | 3 | 2 | 2 | 285 | 460 | 575 | 575 | 226 | 1,198 | 1,478 | 1,270 |
| Iran | 35 | 40 | 66 | 46 | 900 | 722 | 609 | 608 | 34,542 | 29,355 | 40,829 | 27,998 |
| Iraq | 4/ 11 | 14 | 19 | 25 | 4/ 752 | 925 | 898 | 930 | 4/ 8,057 | 12,928 | 17,075 | 23,200 |
| Lebanon | 4 | 4/ 5 | 6 | 8 | 600 | 4/ 705 | 680 | 580 | 2,350 | 4/ 3,525 | 3,907 | 4,651 |
| Syria | 11 | 4/ 16 | 12 | 17 | 730 | 4/ 719 | 706 | 654 | 8,250 | 4/ 11,570 | 8,097 | 10,693 |
| Turkey | 194 | 304 | 340 | 323 | 661 | 638 | 730 | 640 | 128,505 | 194,109 | 249,119 | 206,350 |
| Asia Major: | | | | | | | | | | | | |
| Burma | 108 | 129 | 138 | 135 | 726 | 690 | 754 | 786 | 78,400 | 88,800 | 103,712 | 106,064 |
| Ceylon | 4/ 14 | 4/ 10 | 15 | 13 | 4/ 615 | 4/ 573 | 480 | 536 | 4/ 9,000 | 4/ 5,730 | 7,100 | 6,700 |
| China 8/ | 1,228 | 4/1,452 | 1,400 | 1,410 | 1,021 | 4/1,017 | 950 | 950 | 1,254,539 | 4/1425,000 | 1,330,000 | 1,340,000 |
| India | 9/ 917 | 812 | 895 | 890 | 9/ 830 | 674 | 675 | 644 | 9/761,000 | 547,150 | 539,840 | 573,440 |
| Indochina | 4/ 44 | 4/ 25 | 30 | 45 | 4/ 728 | 4/ 600 | 667 | 735 | 4/ 32,004 | 4/ 15,000 | 20,000 | 33,100 |
| Pakistan | 9/ 355 | 172 | 174 | 192 | 9/ 913 | 910 | 946 | 1,045 | 9/324,053 | 156,511 | 164,771 | 200,627 |
| Indonesia | 449 | 4/ 178 | 350 | 350 | 495 | 4/ 349 | 303 | 330 | 222,372 | 4/ 62,230 | 106,105 | 115,000 |
| Japan | 92 | 129 | 160 | 172 | 1,621 | 1,619 | 1,455 | 1,487 | 148,680 | 208,092 | 224,417 | 255,817 |
| Korea | 46 | 4/ 44 | 35 | 61 | 1,239 | 4/1,302 | 938 | 1,072 | 57,304 | 4/ 59,080 | 32,848 | 65,401 |
| Philippine Islands | 176 | 111 | 89 | 90 | 474 | 552 | 602 | 608 | 82,292 | 62,066 | 54,005 | 54,700 |
| Taiwan (Formosa) | 4 | 3/ | 14 | 14 | 1,490 | 3/ | 1,569 | 1,550 | 5,961 | 13,740 | 21,967 | 21,715 |
| Thailand | 4/ 53 | 83 | 108 | 115 | 4/ 489 | 380 | 375 | 364 | 25,900 | 35,200 | 40,695 | 41,890 |
| Total Asia (excl.U.S.S.R.) | 3,742 | 3,527 | 3,853 | 3,908 | - | - | - | - | 3,183,435 | 2,931,284 | 2,965,965 | 3,088,616 |
| OCEANIA: | | | | | | | | | | | | |
| Australia | 10 | 5 | 8 | 8 | 532 | 789 | 811 | 963 | 5,276 | 3,649 | 6,507 | 7,947 |
| New Zealand | 2 | 4 | 4 | 3 | 787 | 1,265 | 1,200 | 1,410 | 1,367 | 4,925 | 4,797 | 4,229 |
| Total Oceania | 12 | 9 | 12 | 11 | - | - | - | - | 6,643 | 8,574 | 11,304 | 12,176 |
| Total World | 7,466 | 7,882 | 8,350 | 8,567 | - | - | - | - | 6,513,933 | 7,257,971 | 7,465,560 | 7,752,484 |

1/ Farm sales weight is about 10 percent above the average dry weight, which is normally reported in export trade statistics. 2/ Preliminary. 3/ Not available. 4/ Less than a 5-year average. 5/ In the case of Germany, data are for Western Germany only. 7/ Includes estimated figures for Albania, Bulgaria, Czechoslavakia, Eastern Germany, Hungary, Poland, Rumania and Soviet Union. 6/ Less than 500 acres. 8/ Does not include Manchuria. 9/ Recently methods of estimating acreage and production have changed in an effort to improve data; therefore, data for 1935-39 are not comparable with later information.

# WORLD PRODUCTION OF TOBACCO BY KINDS

## (CALENDAR YEAR 1954 WITH COMPARISON)



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## PRODUCTION OF UNMANUFACTURED TOBACCO BY KIND IN 1954

### Flue-Cured

Output of flue-cured is estimated at 2,481 million pounds, an increase of 174 million above 1953 and approximately 25 percent more than the 1947-51 average. The upward trend continued in most producing countries with greatest expansions occurring in the United States, Canada, Japan, Korea, Southern Rhodesia, Communist China, Indonesia, and Venezuela. Production in the United States increased 55.7 million pounds from the level of 1953 when unfavorable weather reduced yields. However, the percentage of total world flue-cured output accounted for by the United States production continues to decline due to the upward trend in other areas. The U. S. produced 53.5 percent of the world's output in 1954 as compared to 55 percent in 1953 and 61.5 percent in the 1947-51 period. Decreases in production were reported in only a few countries with the largest declines in Thailand, India and the Union of South Africa. In the latter case almost all of the reduction was due to the shift from Amarello to Orinoco.

In 1955, Indonesia reportedly plans to increase output 20 to 25 percent and Pakistan, Philippines and other countries plan to expand production; while Thailand plans to substantially reduce the acreage. Most other countries for which information relative to plans for 1955 are available indicate plans for continued expansion if weather conditions are favorable.

### Burley (light air-cured)

World output of Burley in 1954 rose to 659 million pounds, an increase of 19.2 million compared to 1953. The United States accounted for most of the rise, but there were also significant increases in Canada, Italy, West Germany, Spain and Iraq. Output declined in Venezuela, French Morocco, Switzerland, Japan and a few other areas.

### Other Light Air-Cured (including Maryland)

Production is estimated at 128.5 million pounds in 1954 or about 7.5 million below that of 1953. The 1954 level is the same as the 1947-51 average, but about 6 percent above the 1935-39 average. Output of Maryland leaf increased in the United States and Argentina as compared to 1953, but decreased in Italy and Madagascar. Other light air-cured, which includes Maryland in some countries, decreased substantially in the Union of South Africa, Argentina, Switzerland and Mauritius. While output of light air-cured is still small in Nigeria, the sharp upward trend continued in 1954.

### Light Sun-Cured

Output of this kind of leaf rose to 712.4 million pounds in 1954, which is 28 million above the 1953 level, but approximately 4 percent below the 1947-51 average.

Most of the light sun-cured is produced in Asia, with Communist China accounting for a large part of the total. Production there is estimated to be the same as last year. Practically all of the increase in 1954 is accounted for by the large output in India and Korea, although output in these two countries is still below the pre-war (1935-39) average. Output declined sharply in Paraguay and Algeria, but production in the latter was still 60 percent above the 1947-51 average.

## Dark Air-Cured (including Cigar)

Production of dark air-cured this year is estimated at 2,665 million pounds. This is 101 million above the outturn of 1953 and 48 million above the 1947-51 average, but is less than the 1935-39 average. Output rose this year for the first time after a long-term downward trend which began many years ago. Most of the increases, except in India, Pakistan and Indochina, were in cigar types (some of which are also used in cigarette mixtures in certain countries) rather than in those types used for smoking tobacco, chewing tobacco and snuff. The largest increases were in Pakistan, the United States, Indochina, India, Dominican Republic, Brazil, Germany and Honduras. There were minor decreases in several countries, but the most significant declines were in Argentina and Italy.

## Dark Sun-Cured

Most of the dark sun-cured types are produced in Asia, the Caribbean Islands and Africa, but sun-cured leaf is also grown in a few other areas. Output of these types is estimated at 233.9 million pounds this year as compared to 217.2 million in 1953 and an average of 246.7 million in the 1947-51 period.

The largest increases were in Cuba and Thailand with a big percentage rise in output of Virginia sun-cured in the United States. Production declined substantially in Nyasaland from 6.3 million pounds in 1953 to 3.3 million in 1954, and from 5.3 million to 4 million in Iran.

## Fire-Cured

Production harvested in 1954 is estimated at 116.8 million pounds, a rise of 6.5 million above the 1953 level, but approximately 25 percent below the 1947-51 average and only 72 percent of the 1935-39 average. Practically all of the increase as compared to 1953 was due to a rise in output of Kentucky-Tennessee and Virginia fire-cured produced in the United States, although there were also increases in Argentina, Tanganyika, Uganda, and Southern Rhodesia. There was a sharp decline in Italy from 30.5 million pounds in 1953 to 24.2 million this year. This year's output in Italy is less than half of the 1947-51 average and only 60 percent of the 1935-39 average.

## Oriental (Turkish) and Semi-Oriental

Total output of these kinds of leaf harvested in 1954 is estimated at 755.7 million pounds, a decline of 52 million from the 1953 level, but well above the 1947-51 and 1935-39 averages.

Most of the decrease was due to lower production in Turkey and Iran, which had declines of 17 and 35 percent, respectively, but output also declined in Italy, Rumania, and Yugoslavia. The largest increases as compared to 1953 were in Greece, Iraq and Syria, and with a 21 percent rise in acreage in Greece the 1954 output would have been considerably higher if weather conditions had been favorable in that area.

FLUE-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons - farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | 51 | 98 | 96 | 123 | 1,070 | 1,142 | 1,379 | 1,504 | 54,616 | 111,646 | 132,352 | 170,000 |
| Costa Rica | - | 3/ | 3/ | 3/ | - | 344 | 300 | 300 | - | 44 | 143 | 205 |
| El Salvador | 3/ | 2 | 3 | 2 | 4/ | 345 | 382 | 373 | 50 | 700 | 1,067 | 839 |
| Guatemala | 3/ | 1 | 1 | 2 | 4/ | 580 | 770 | 725 | 132 | 390 | 431 | 254 |
| Honduras | - | 3/ | 1 | 1 | - | 405 | 345 | 345 | - | 120 | 250 | 175 |
| Mexico | 1 | 4 | 5 | 5 | 720 | 850 | 786 | 862 | 700 | 3,579 | 4,279 | 4,814 |
| Nicaragua | - | 1 | 1 | 1 | - | 900 | 900 | 1,000 | - | 700 | 600 | 1,100 |
| United States | 981 | 1,010 | 1,022 | 1,039 | 876 | 1,229 | 1,245 | 1,278 | 863,619 | 1,246,160 | 1,272,200 | 1,327,871 |
| Jamaica | - | - | - | 4/ | - | - | - | 4/ | - | - | - | 75 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 1 | 9 | 12 | 4/ | 1,000 | 887 | 974 | 4/ | 599 | 7,983 | 14,790 | 15,432 |
| Brazil | 10 | 35 | 45 | 42 | 1,200 | 1,299 | 1,304 | 1,330 | 12,549 | 45,498 | 58,697 | 56,217 |
| Chile | 3/ | 3/ | 1 | 1 | 4/ | 1,464 | 992 | 1,346 | 203 | 478 | 520 | 705 |
| Venezuela | - | 3 | 7 | 12 | - | 881 | 892 | 900 | - | 2,724 | 6,363 | 10,803 |
| EUROPE: | | | | | | | | | | | | |
| Germany, Western | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 1,500 | 9,000 | 10,320 |
| Italy | 2 | 8 | 14 | 15 | 1,900 | 1,963 | 1,749 | 1,756 | 3,800 | 16,100 | 24,491 | 26,345 |
| Spain | - | 4/ | 4/ | 1 | - | 4/ | 4/ | 1,100 | - | 800 | 554 | 1,102 |
| Switzerland | - | - | - | 4/ | - | - | - | - | - | - | - | 1,327 |
| Other Europe (Incl. U.S.S.R.) | 5 | 10 | 12 | 12 | 1,534 | 1,311 | 1,163 | 1,163 | 7,670 | 13,111 | 13,500 | 13,500 |
| AFRICA: | | | | | | | | | | | | |
| Kenya | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 180 | 220 | 220 |
| Nyasaland | 4/ | 5 | 7 | 6 | 4/ | 539 | 511 | 600 | 2,267 | 2,697 | 3,568 | 3,910 |
| Tanganyika | 3/ | 3/ | 4/ | 4/ | 4/ | 515 | 4/ | 4/ | 6 | 2,060 | 2,491 | 3,438 |
| Uganda | 4/ | 1 | 2 | 2 | 4/ | 400 | 473 | 440 | 4/ | 235 | 945 | 880 |
| Mauritius | - | 3/ | 1 | 1 | - | 1,500 | 1,500 | 1,267 | 430 | 623 | 898 | 631 |
| Mozambique | - | 3 | 3 | 4/ | - | 383 | 400 | 4/ | - | 1,150 | 1,200 | 2,200 |
| Nigeria | - | 1 | 1 | 1 | - | 500 | 500 | 500 | - | 230 | 350 | 380 |
| Northern Rhodesia | 4 | 13 | 20 | 20 | 450 | 425 | 472 | 400 | 1,500 | 5,415 | 10,323 | 8,000 |
| Southern Rhodesia | 46 | 130 | 179 | 173 | 509 | 633 | 603 | 700 | 24,623 | 82,321 | 105,100 | 119,440 |
| Union of South Africa | | | | | | | | | | | | |
| Amorello | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 2,715 | 19,335 | 2,734 | - |
| Orinoco | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 600 | 2,500 | 14,572 | 14,513 |
| ASIA: | | | | | | | | | | | | |
| Cyprus | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 4/ | 9 | 9 |
| Iraq | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 6,349 | 8,800 |
| Turkey | - | - | 3/ | 3/ | - | - | 500 | 600 | - | - | 1,014 | 1,200 |
| Burma | - | 3/ | 1 | 1 | - | 700 | 713 | 800 | - | 88 | 672 | 784 |
| Ceylon | - | 1 | 5 | 5 | - | 475 | 400 | 500 | - | 950 | 2,000 | 2,500 |
| China | 150 | 302 | 300 | 300 | 1,006 | 830 | 967 | 1,000 | 150,900 | 250,000 | 290,000 | 300,000 |
| India | 60 | 120 | 168 | 180 | 440 | 532 | 658 | 589 | 26,900 | 64,510 | 110,500 | 106,000 |
| Indochina | - | 4/ | 4/ | 1 | - | 4/ | 4/ | 550 | - | 450 | 550 | 600 |
| Pakistan | - | 3 | 4 | 7 | - | 698 | 1,000 | 900 | - | 1,865 | 4,000 | 6,700 |
| Indonesia | - | 4/ | 23 | 31 | - | 4/ | 430 | 570 | - | 777 | 9,921 | 17,637 |
| Japan | 46 | 58 | 99 | 109 | 1,616 | 1,500 | 1,288 | 1,429 | 74,340 | 86,887 | 126,703 | 155,808 |
| Korea | 15 | 13 | 13 | 27 | 1,456 | 1,400 | 1,170 | 1,140 | 21,839 | 18,990 | 15,212 | 30,787 |
| Philippine Republic | 1 | 2 | 5 | 4/ | 550 | 647 | 481 | 4/ | 342 | 1,320 | 2,425 | 4,000 |
| Taiwan | 3 | 14 | 14 | 14 | 1,200 | 944 | 1,361 | 1,550 | 3,751 | 13,220 | 21,967 | 21,715 |
| Thailand | 3 | 29 | 62 | 70 | 280 | 300 | 368 | 250 | 900 | 8,200 | 22,625 | 17,640 |
| OCEANIA: | | | | | | | | | | | | |
| Australia | 10 | 5 | 8 | 8 | 532 | 789 | 811 | 963 | 5,276 | 3,649 | 6,507 | 7,947 |
| New Zealand | 2 | 4 | 4 | 3 | 683 | 1,200 | 1,160 | 1,407 | 1,367 | 4,825 | 4,647 | 4,218 |
| Total | - | - | - | - | - | - | - | - | 1,261,694 | 2,024,010 | 2,306,739 | 2,481,041 |

See footnotes at end of circular.

LIGHT AIR-CURED BURLEY TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons - farm sales weight 1/

| Continent and Country | Acreage Harvested |  |  |  | Yield per Acre |  |  |  | Production |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Averages |  |  |  | Averages |  |  |  | Averages |  |  |  |
|  | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
|  | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Canada | 9 | 8 | 1 | 3 | 1,195 | 1,183 | 1,569 | 1,400 | 10,749 | 10,040 | 1,709 | 4,200 |
| Costa Rica | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 1 | 2 | 5 |
| El Salvador | - | - | 3/ | 3/ | - | - | 668 | 667 | - | - | 97 | 44 |
| Guatemala | - | 3/ | 3/ | 3/ | - | 721 | 718 | 760 | - | 120 | 172 | 152 |
| Mexico | 3/ | 1 | 1 | 1 | 1,200 | 1,340 | 1,300 | 1,338 | 300 | 1,700 | 1,742 | 2,016 |
| United States | 372 | 433 | 423 | 396 | 839 | 1,277 | 1,348 | 1,468 | 315,826 | 552,736 | 569,868 | 581,710 |
| Nicaragua | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 50 | 150 | 150 |
| SOUTH AMERICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Argentina | 3/ | 3/ | 1 | 1 | 638 | 500 | 615 | 615 | 99 | 496 | 661 | 661 |
| Brazil | - | 1 | 4 | 3 | - | 1,200 | 800 | 1,020 | - | 2,000 | 3,000 | 3,472 |
| Chile | - | 3/ | 3/ | 3/ | - | 1,650 | 1,802 | 1,917 | - | 171 | 247 | 265 |
| Venezuela | - | 2 | 5 | 3 | - | 873 | 742 | 882 | - | 1,550 | 3,684 | 2,646 |
| EUROPE: |  |  |  |  |  |  |  |  |  |  |  |  |
| Austria | - | - | 1 | 4/ | - | - | 1,400 | 4/ | - | - | 1,274 | 1,500 |
| Germany, Western | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 5,500 | 5,300 | 7,000 |
| Italy | 2 | 6 | 6 | 8 | 2,200 | 2,283 | 2,476 | 2,084 | 4,600 | 13,700 | 14,861 | 16,689 |
| Spain | 4/ | 4/ | 14 | 15 | 4/ | 4/ | 1,398 | 1,396 | 3,000 | 6,425 | 19,577 | 20,944 |
| Switzerland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 694 | 1,641 | 1,962 | 1,100 |
| AFRICA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Nyasaland | - | 2 | 3 | 3 | - | 475 | 550 | 550 | - | 1,025 | 1,673 | 1,933 |
| French Morocco | 3/ | 1 | 4 | 4 | 800 | 1,100 | 1,179 | 992 | 500 | 878 | 4,718 | 3,968 |
| Northern Rhodesia | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 10 | 205 | 120 | 105 |
| Union of South Africa | - | - | - | 4/ | - | - | - | 4/ | - | - | - | 374 |
| ASIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| Iraq | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 3,177 | 4,400 |
| India | - | 3 | 3 | 3 | - | 500 | 500 | 700 | - | 1,640 | 1,650 | 2,240 |
| Japan | 2 | 5 | 2 | 2 | 1,480 | 1,734 | 1,948 | 1,649 | 2,974 | 8,982 | 4,151 | 3,565 |
| OCEANIA: |  |  |  |  |  |  |  |  |  |  |  |  |
| New Zealand | - | 3/ | 3/ | 3/ | - | 500 | 500 | 550 | - | 100 | 150 | 11 |
| Total | - | - | - | - | - | - | - | - | 338,752 | 608,960 | 639,945 | 659,150 |

See footnotes at end of circular.

OTHER LIGHT AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons - farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | | | | | | | | | | | | |
| Maryland | 37 | 49 | 45 | 46 | 769 | 795 | 825 | 850 | 28,845 | 39,112 | 37,125 | 39,100 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | | | | | | | | | | | | |
| Maryland | 1 | 1 | 1 | 4/ | 800 | 500 | 615 | 4/ | 596 | 489 | 661 | 772 |
| Native | 3 | 5 | 10 | 4/ | 1,220 | 1,022 | 1,230 | 4/ | 4,388 | 6,109 | 14,330 | 11,023 |
| EUROPE: | | | | | | | | | | | | |
| Italy | | | | | | | | | | | | |
| Maryland | 1 | 3 | 4 | 4 | 2,500 | 2,600 | 2,417 | 1,979 | 3,400 | 7,800 | 9,667 | 7,915 |
| Switzerland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 582 | 1,407 | 436 | 309 |
| Other Europe (Incl. U.S.S.R.) | 60 | 63 | 63 | 63 | 1,076 | 871 | 873 | 873 | 64,557 | 54,897 | 55,000 | 55,000 |
| AFRICA: | | | | | | | | | | | | |
| Madagascar | | | | | | | | | | | | |
| Maryland | 17 | 11 | 17 | 19 | 750 | 567 | 505 | 440 | 12,764 | 6,240 | 8,585 | 8,377 |
| Mauritius | | | | | | | | | | | | |
| Amarillo | 3/ | 3/ | 3/ | 3/ | 1,400 | 1,450 | 2,066 | 1,605 | 220 | 227 | 556 | 427 |
| Nigeria | - | 1 | 2 | 4 | - | 500 | 550 | 440 | - | 260 | 1,100 | 1,550 |
| Union of South Africa | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 5,722 | 11,000 | 7,371 | 2,990 |
| ASIA: | | | | | | | | | | | | |
| Syria | | | | | | | | | | | | |
| Virginia & Burley | - | 4/ | - | - | - | 4/ | - | - | - | 60 | - | - |
| Cyprus | - | 2 | 2 | 2 | - | 450 | 490 | 430 | - | 903 | 1,187 | 1,000 |
| Total | - | - | - | - | - | - | - | - | 121,074 | 128,504 | 136,018 | 128,463 |

See footnotes at end of circular.

DARK AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons - farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Canada | | | | | | | | | | | | |
| Cigar | 4 | 4 | 3 | 4 | 1,243 | 1,230 | 1,277 | 1,075 | 5,102 | 5,000 | 3,830 | 4,300 |
| Other | 5 | 3 | 1 | 2 | 1,060 | 1,051 | 1,083 | 750 | 6,089 | 2,759 | 1,299 | 1,500 |
| El Salvador | | | | | | | | | | | | |
| (Incl. cigar & shade) | 1 | 1 | 1 | 3/ | 650 | 625 | 627 | 631 | 700 | 413 | 319 | 175 |
| Guatemala | 5 | 6 | 6 | 6 | 382 | 579 | 580 | 490 | 1,760 | 3,410 | 3,652 | 3,043 |
| Honduras | | | | | | | | | | | | |
| Dark air & copan | 7 | 11 | 13 | 20 | 606 | 686 | 518 | 600 | 4,500 | 7,795 | 7,000 | 12,000 |
| Mexico | 37 | 48 | 40 | 40 | 667 | 700 | 636 | 680 | 25,000 | 34,100 | 37,217 | 39,800 |
| Nicaragua | | | | | | | | | | | | |
| Chilcagre | 1 | 1 | 1 | 2 | 800 | 415 | 600 | 750 | 800 | 400 | 600 | 1,600 |
| United States | | | | | | | | | | | | |
| One sucker | 21 | 17 | 15 | 13 | 844 | 1,138 | 1,106 | 1,327 | 18,959 | 19,228 | 16,368 | 17,915 |
| Green River | 19 | 10 | 7 | 7 | 838 | 1,082 | 970 | 1,250 | 15,788 | 11,147 | 7,275 | 8,875 |
| Cigar filler | 42 | 43 | 29 | 31 | 1,273 | 1,517 | 1,409 | 1,657 | 53,575 | 64,583 | 40,430 | 51,040 |
| Cigar binder | 34 | 40 | 29 | 32 | 1,462 | 1,536 | 1,614 | 1,538 | 47,836 | 61,065 | 47,291 | 48,448 |
| Cigar wrapper | 10 | 14 | 12 | 13 | 955 | 1,064 | 1,201 | 1,242 | 9,108 | 15,233 | 14,656 | 16,017 |
| Perique | 3/ | 1 | 3/ | 3/ | 454 | 646 | 670 | 760 | 192 | 325 | 168 | 190 |
| Dominican Republic | | | | | | | | | | | | |
| Criollo & Orlor | 25 | 44 | 45 | 47 | 985 | 965 | 685 | 818 | 24,625 | 42,000 | 30,864 | 38,435 |
| Haiti | - | 4/ | - | 4/ | - | 4/ | - | 4/ | - | 5/ 7,500 | - | 3,350 |
| Jamaica | - | 5 | - | 2 | - | 500 | - | 450 | - | 2,250 | - | 603 |
| Cigar-native-cow tongue | - | 1 | - | 3/ | - | 300 | - | 300 | - | 250 | - | 100 |
| Panama | - | 2 | 2 | 2 | - | 450 | 450 | 450 | - | 720 | 720 | 720 |
| Puerto Rico | | | | | | | | | | | | |
| Cigar filler | 44 | 35 | 36 | 40 | 673 | 769 | 976 | 840 | 29,393 | 26,921 | 33,125 | 32,940 |
| Chewing | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 1,200 | 1,200 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | | | | | | | | | | | | |
| Native | 20 | 42 | 56 | 4/ | 914 | 917 | 894 | 4/ | 18,187 | 37,049 | 48,108 | 40,322 |
| Bahia cigar | 2 | 6 | 8 | 4/ | 779 | 690 | 692 | 4/ | 1,845 | 4,141 | 4,489 | 3,502 |
| Cuerda cigar | 1 | 2 | 1 | 1 | 1,000 | 1,000 | 1,000 | 1,000 | 1,200 | 2,400 | 956 | 819 |
| Bolivia | 3 | 3 | 3 | 3 | 700 | 700 | 700 | 700 | 2,500 | 2,100 | 2,100 | 2,126 |
| Brazil | | | | | | | | | | | | |
| Bahia cigar | 90 | 85 | 92 | 93 | 850 | 658 | 650 | 695 | 76,600 | 56,000 | 59,917 | 64,718 |
| Other cigar | 4 | 4 | 7 | 7 | 850 | 600 | 580 | 580 | 3,400 | 2,350 | 4,000 | 4,000 |
| Twist & other | 146 | 212 | 234 | 288 | 750 | 600 | 663 | 580 | 110,154 | 127,272 | 165,691 | 167,611 |
| Chile | | | | | | | | | | | | |
| Paraguayan | 7 | 6 | 4 | 5 | 1,850 | 1,773 | 1,773 | 1,696 | 12,024 | 11,171 | 6,854 | 8,267 |
| Cigar | 2 | 2 | 2 | 2 | 1,845 | 1,856 | 1,856 | 1,805 | 4,391 | 2,899 | 4,330 | 3,924 |
| Colombia | | | | | | | | | | | | |
| Native | 37 | 47 | 50 | 69 | 4/ | 4/ | 4/ | 4/ | 10,000 | 15,827 | 6,746 | 7,063 |
| Garcia | | | | | 4/ | 4/ | 4/ | 4/ | 18,000 | 23,800 | 32,044 | 33,551 |
| Cubita | | | | | 4/ | 4/ | 4/ | 4/ | 3,697 | 5,400 | 17,427 | 18,247 |
| Paraguay | | | | | | | | | | | | |
| Fuerte | 6 | 3 | 4 | 4/ | 741 | 1,100 | 981 | 4/ | 4,448 | 4,400 | 3,936 | 2,756 |
| Uruguay | 1 | 1 | 1 | 1 | 860 | 967 | 829 | 1,129 | 1,254 | 957 | 545 | 837 |
| Venezuela | 4/ | 3 | 4 | 2 | 4/ | 604 | 892 | 770 | 7,700 | 1,950 | 3,086 | 1,542 |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EUROPE: | | | | | | | | | | | | |
| Austria | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 349 | 484 |
| Belgium | 6 | 5 | 4 | 3 | 2,598 | 1,924 | 1,676 | 2,068 | 16,431 | 9,432 | 6,702 | 6,206 |
| France | | | | | | | | | | | | |
| Lege | 40 | 67 | 68 | 69 | 1,665 | 1,550 | 1,498 | 1,478 | 65,700 | 103,570 | 101,897 | 102,000 |
| Other | 4 | 3 | 2 | 2 | 1,800 | 1,750 | 1,050 | 1,333 | 7,295 | 5,500 | 1,578 | 2,000 |
| Italy | | | | | | | | | | | | |
| Beneventano | 3 | 6 | 7 | 7 | 1,433 | 1,161 | 1,320 | 1,133 | 4,300 | 7,200 | 9,242 | 7,936 |
| Nostrano | 2 | 5 | 8 | 8 | 1,458 | 1,540 | 1,558 | 1,488 | 3,500 | 7,700 | 12,460 | 11,905 |
| Blending | 1 | 1 | 4/ | 4/ | 760 | 500 | 4/ | 4/ | 500 | 200 | 13 | 24 |
| Snuff & nicotine | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 600 | 900 | 205 | 265 |
| Sub-tropical | 1 | 7 | 4 | 4 | 1,500 | 1,515 | 1,384 | 1,218 | 1,600 | 10,000 | 5,535 | 4,872 |
| Spain | | | | | | | | | | | | |
| Valencia | 4/ | 4/ | 35 | 35 | 4/ | 4/ | 1,342 | 1,342 | 14,322 | 27,200 | 46,980 | 45,635 |
| Cigar filler & binder | - | - | 1 | 1 | - | - | 500 | 700 | - | - | 575 | 771 |
| Cigar wrapper | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 50 | 133 |
| Sweden | 1 | 1 | 3/ | 1 | 1,735 | 1,526 | 1,400 | 1,650 | 1,061 | 859 | 660 | 660 |
| Switzerland | | | | | | | | | | | | |
| Nostrano, Brenta, Monte | 1 | 1 | 1 | 1 | 1,000 | 1,200 | 1,400 | 1,500 | 1,000 | 1,641 | 1,962 | 1,100 |
| Yugoslavia | | | | | | | | | | | | |
| Cigar & dark air-cured | 4 | 9 | 10 | 10 | 1,122 | 795 | 780 | 691 | 4,490 | 7,155 | 7,716 | 7,275 |
| Germany, Western | | | | | | | | | | | | |
| Cigar-Havana and Guerdentheimer | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 41,000 | 25,800 | 22,700 | 28,800 |
| Other | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 33,355 | 14,182 | 9,300 | 11,200 |
| Other Europe (Incl. U.S.S.R.) | 319 | 345 | 364 | 364 | 1,122 | 930 | 878 | 875 | 357,647 | 320,952 | 319,580 | 318,550 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 29 | 40 | 33 | 35 | 750 | 580 | 750 | 692 | 21,667 | 23,271 | 24,795 | 24,250 |
| Belgium Congo | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 1,684 | 1,950 | 2,000 |
| Kenya | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 300 | 340 | 300 | 300 |
| Tanganyika | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 501 | 507 | 254 | 235 |
| Uganda | 1 | 1 | 2 | 2 | 200 | 200 | 200 | 200 | 206 | 303 | 401 | 400 |
| French Morocco | | | | | | | | | | | | |
| Snuff | 4/ | 4/ | 1 | 1 | 4/ | 4/ | 900 | 926 | 204 | 400 | 900 | 926 |
| Madagascar | | | | | | | | | | | | |
| Corse | 4/ | 4/ | 3/ | 1 | 4/ | 4/ | 520 | 447 | 1,400 | 950 | 1,047 | 882 |
| Mozambique | | | | | | | | | | | | |
| Air & sun-cured | 1 | 1 | 1 | 1 | 450 | 450 | 400 | 400 | 467 | 385 | 300 | 220 |
| Nigeria | 56 | 57 | 63 | 64 | 400 | 360 | 397 | 392 | 22,300 | 24,000 | 25,000 | 25,080 |
| Tunisia | | | | | | | | | | | | |
| Arbi | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 902 | 1,555 | 3,005 | 1,396 |
| Souffi | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 360 | 650 | 1,633 | 1,510 |
| Union of South Africa | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 15,160 | 13,676 | 18,471 | 21,551 |
| ASIA: | | | | | | | | | | | | |
| Iraq | - | 4/ | 4/ | 4/ | - | 4/ | 4/ | 4/ | - | 1,200 | 1,200 | 1,200 |
| Iran | | | | | | | | | | | | |
| Tumbeki - water pipe | 6 | 3 | 2 | 2 | 1,460 | 1,322 | 1,338 | 1,289 | 9,772 | 3,993 | 2,977 | 2,866 |
| Lebanon | | | | | | | | | | | | |
| Tombac | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 101 | 110 |
| Syria | | | | | | | | | | | | |
| Tombac | 1 | 1 | 1 | 3/ | 800 | 805 | 500 | 700 | 820 | 800 | 514 | 825 |
| Other | - | - | 4/ | - | - | - | 4/ | - | - | - | 99 | - |
| Turkey | 1 | 1 | 1 | 1 | 350 | 350 | 500 | 700 | 386 | 360 | 877 | 1,000 |
| Burma | 108 | 129 | 137 | 134 | 726 | 689 | 752 | 785 | 78,400 | 88,712 | 103,040 | 105,280 |
| Ceylon (incl.cigar) | 10 | 6 | 7 | 6 | 580 | 560 | 500 | 500 | 6,200 | 3,420 | 3,500 | 3,000 |
| China | | | | | | | | | | | | |
| Cigar types | 501 | 500 | 500 | 500 | 1,026 | 1,000 | 850 | 850 | 514,003 | 500,000 | 440,000 | 440,000 |
| India | 666 | 522 | 503 | 4/ | 960 | 770 | 712 | 4/ | 629,260 | 402,000 | 357,910 | 369,600 |
| Indochina | 44 | 25 | 29 | 4/ | 727 | 580 | 670 | 4/ | 32,004 | 14,550 | 19,450 | 32,500 |
| Pakistan | 355 | 169 | 170 | 185 | 915 | 920 | 950 | 1,048 | 324,053 | 154,646 | 160,771 | 193,927 |
| Indonesia | | | | | | | | | | | | |
| Deli (Sumatra wrapper) | 31 | 6/ 10 | 11 | 12 | 972 | 6/ 785 | 520 | 500 | 30,131 | 6/ 7,898 | 5,731 | 6,000 |
| Vorstenlanden (cigar) | 40 | 6/ 1 | 2 | 1 | 563 | 6/ 442 | 400 | 400 | 22,546 | 6/ 442 | 793 | 440 |
| Java filler & binder | 15 | 6/ 7 | 31 | 30 | 500 | 6/ 500 | 500 | 500 | 7,500 | 6/ 3,497 | 15,431 | 15,000 |
| Krossok and other | 363 | 6/ 160 | 283 | 276 | 450 | 6/ 310 | 262 | 275 | 162,195 | 6/ 49,616 | 74,229 | 75,923 |
| Japan | | | | | | | | | | | | |
| Native | 44 | 66 | 59 | 61 | 1,621 | 1,505 | 1,576 | 1,580 | 71,366 | 112,223 | 93,563 | 96,445 |
| Philippine Republic | 175 | 109 | 84 | 82 | 466 | 545 | 608 | 618 | 81,950 | 60,746 | 51,580 | 50,700 |
| TOTAL | - | - | - | - | - | - | - | - | 3,105,681 | 2,616,930 | 2,563,569 | 2,664,918 |

See footnotes at end of circular.

LIGHT SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons- farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| Costa Rica | - | 3 | 3 | 2 | - | 806 | 800 | 800 | - | 2,236 | 1,855 | 1,900 |
| Mexico | 13 | 37 | 33 | 33 | 921 | 1,098 | 1,158 | 1,170 | 12,200 | 40,046 | 45,200 | 45,600 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Paraguay | | | | | | | | | | | | |
| Flojo | 16 | 13 | 13 | 4/ | 834 | 900 | 905 | 4/ | 13,344 | 14,038 | 11,765 | 8,267 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 20 | 28 | 51 | 39 | 660 | 690 | 747 | 678 | 13,000 | 16,500 | 38,124 | 26,455 |
| ASIA: | | | | | | | | | | | | |
| China 7/ | 491 | 525 | 500 | 500 | 1,022 | 1,048 | 1,000 | 1,000 | 501,818 | 550,000 | 500,000 | 500,000 |
| India 8/ | 191 | 167 | 124 | 4/ | 549 | 473 | 643 | 4/ | 104,840 | 79,000 | 69,780 | 95,600 |
| Korea | | | | | | | | | | | | |
| Native | 31 | 31 | 22 | 32 | 1,145 | 1,293 | 802 | 1,049 | 35,465 | 40,090 | 17,636 | 33,578 |
| Yanguiel | - | - | - | 2 | - | - | - | 518 | - | - | - | 1,036 |
| TOTAL | - | - | - | - | - | - | - | - | 680,667 | 741,910 | 684,360 | 712,436 |

See footnotes at end of circular.

DARK SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries, harvested in calendar year 1954 with comparisons- farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | 3 | 3 | 4 | 5 | 844 | 1,112 | 790 | 1,025 | 2,769 | 3,330 | 2,923 | 4,715 |
| Cuba | | | | | | | | | | | | |
| Vuelta Abajo 9/ (wrapper, binder, filler) | 42 | 51 | 54 | 65 | 468 | 603 | 707 | 685 | 19,669 | 30,630 | 38,156 | 44,400 |
| Semi-Vuelta (filler) | 6 | 8 | 8 | 10 | 365 | 418 | 542 | 500 | 2,188 | 3,589 | 4,400 | 4,800 |
| Remedios (filler) | 56 | 67 | 68 | 85 | 413 | 501 | 440 | 440 | 23,106 | 33,869 | 29,800 | 35,100 |
| Partido (shade grown wrapper) 9/ | 2 | 3 | 3 | 3 | 680 | 710 | 750 | 750 | 1,364 | 2,280 | 2,800 | 3,100 |
| Oriente (cigarette & chewing) | 2 | 3 | 3 | 5 | 883 | 710 | 750 | 750 | 1,765 | 2,161 | 3,000 | 3,500 |
| EUROPE: | | | | | | | | | | | | |
| Belgium | - | - | 1 | 1 | - | - | 2,000 | 2,000 | - | - | 2,339 | 2,172 |
| AFRICA: | | | | | | | | | | | | |
| Algeria | 7 | 7 | 4 | 4 | 600 | 700 | 550 | 550 | 4,000 | 4,900 | 2,200 | 2,200 |
| Nyasaland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 1,335 | 3,929 | 6,270 | 3,285 |
| Northern Rhodesia | 4/ | 1 | 4/ | 4/ | 4/ | 400 | 4/ | 4/ | 60 | 74 | 20 | 30 |
| ASIA: | | | | | | | | | | | | |
| Iran | | | | | | | | | | | | |
| Pipe | 14 | 9 | 6 | 4 | 990 | 867 | 892 | 990 | 14,370 | 7,862 | 5,290 | 3,968 |
| Lebanon | - | 4/ | 6 | 6 | - | 4/ | 314 | 401 | - | 1,525 | 1,883 | 2,409 |
| China | 86 | 125 | 100 | 100 | 1,021 | 1,000 | 1,000 | 1,000 | 87,818 | 125,000 | 100,000 | 100,000 |
| Taiwan | 1 | 4/ | - | - | 2,000 | 4/ | - | - | 2,210 | 520 | - | - |
| Thailand | 50 | 54 | 46 | 45 | 500 | 500 | 486 | 538 | 25,000 | 27,000 | 18,070 | 24,250 |
| TOTAL | - | - | - | - | - | - | - | - | 185,654 | 246,669 | 217,151 | 233,929 |

See footnotes at end of circular.

FIRE-CURED TOBACCO: Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons- farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| NORTH AMERICA: | | | | | | | | | | | | |
| United States | | | | | | | | | | | | |
| Virginia fire-cured | 23 | 11 | 10 | 10 | 810 | 1,165 | 930 | 1,175 | 18,804 | 13,005 | 9,207 | 11,750 |
| Kentucky-Tennessee | 105 | 51 | 38 | 48 | 813 | 1,124 | 985 | 1,180 | 84,733 | 56,803 | 39,710 | 48,403 |
| SOUTH AMERICA: | | | | | | | | | | | | |
| Argentina | 1 | 3 | 3 | 4/ | 880 | 824 | 900 | 4/ | 1,069 | 2,473 | 882 | 2,205 |
| EUROPE: | | | | | | | | | | | | |
| Italy | 25 | 37 | 21 | 18 | 1,596 | 1,378 | 1,452 | 1,345 | 39,900 | 51,400 | 30,471 | 24,206 |
| Other Europe (Incl. U.S.S.R.) | 3/ | 1 | 1 | 1 | 800 | 875 | 900 | 900 | 511 | 874 | 900 | 900 |
| AFRICA: | | | | | | | | | | | | |
| Nyasaland | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 12,149 | 20,976 | 23,838 | 23,326 |
| Tanganyika | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 367 | 2,021 | 851 | 1,732 |
| Uganda | 3 | 4 | 5 | 5 | 450 | 500 | 480 | 500 | 1,294 | 2,133 | 2,424 | 2,500 |
| Southern Rhodesia | 2 | 2 | 1 | 1 | 475 | 500 | 500 | 500 | 862 | 913 | 368 | 560 |
| ASIA: | | | | | | | | | | | | |
| Ceylon (chewing & snuff) | 4 | 3 | 3 | 2 | 700 | 680 | 800 | 800 | 2,800 | 1,360 | 1,600 | 1,200 |
| Total | - | - | - | - | - | - | - | - | 162,489 | 151,958 | 110,251 | 116,782 |

See footnotes at end of circular.

ORIENTAL TOBACCO (including semi-oriental): Estimated acreage, yield and production in specified countries harvested in calendar year 1954 with comparisons -farm sales weight 1/

| Continent and Country | Acreage Harvested | | | | Yield per Acre | | | | Production | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Averages | | | | Averages | | | | Averages | | | |
| | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ | 1935-39 | 1947-51 | 1953 | 1954 2/ |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Pounds | Pounds | Pounds | Pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| AFRICA: | | | | | | | | | | | | |
| Northern Rhodesia | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 15 | 391 | 30 | 100 |
| Southern Rhodesia | 2 | 4/ | 4/ | 1 | 353 | 4/ | 4/ | 350 | 665 | 1,445 | 150 | 250 |
| Union of South Africa | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 775 | 910 | 1,012 | 1,124 |
| EUROPE: | | | | | | | | | | | | |
| Greece | | | | | | | | | | | | |
| Turkish | 226 | 213 | 217 | 263 | 589 | 531 | 620 | 526 | 132,819 | 113,320 | 134,445 | 138,387 |
| Italy | | | | | | | | | | | | |
| Semi-oriental | 40 | 69 | 58 | 56 | 725 | 762 | 752 | 726 | 28,300 | 52,900 | 43,625 | 40,675 |
| Yugoslavia | | | | | | | | | | | | |
| Oriental (Prelep) | 12 | 30 | 27 | 30 | 1,025 | 656 | 787 | 676 | 12,348 | 19,675 | 21,384 | 20,062 |
| Semi-oriental (Jaka, Ravnjak, Trance, Otlja) | 23 | 50 | 47 | 51 | 895 | 655 | 732 | 672 | 20,572 | 32,792 | 34,833 | 34,392 |
| Other Europe (incl. U.S.S.R.) | 327 | 331 | 341 | 341 | 935 | 850 | 810 | 805 | 305,846 | 281,615 | 276,220 | 274,350 |
| ASIA: | | | | | | | | | | | | |
| Cyprus | | | | | | | | | | | | |
| Latakia - fumigated 10/ | - | 1 | 4/ | 4/ | - | 500 | 4/ | 4/ | - | 295 | 282 | 261 |
| Iran | | | | | | | | | | | | |
| Oriental cigarette | 15 | 28 | 58 | 40 | 700 | 615 | 553 | 537 | 10,400 | 17,500 | 32,562 | 21,164 |
| Iraq | | | | | | | | | | | | |
| Oriental | - | - | 4/ | 4/ | - | - | 4/ | 4/ | - | - | 6,349 | 8,800 |
| Lebanon | | | | | | | | | | | | |
| Shak al Bent | 2 | 4/ | 4/ | 4/ | 390 | 4/ | 4/ | 4/ | 780 | 400 | 123 | 132 |
| Latakia 10/ | 2 | 2 | 2 | 2 | 785 | 800 | 900 | 1,000 | 1,570 | 1,600 | 1,800 | 2,000 |
| Syria | | | | | | | | | | | | |
| Abu Riha-Latakia 10/ | 5 | 7 | 5 | 6 | 875 | 875 | 556 | 538 | 4,300 | 6,100 | 2,784 | 3,228 |
| Oriental air-cured | | | | | | | | | | | | |
| Shak al Bent | 5 | 3 | 6 | 11 | 620 | 580 | 779 | 601 | 3,100 | 4,590 | 4,674 | 6,614 |
| Hasan Kayf | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 30 | 20 | 26 | 26 |
| Turkey | | | | | | | | | | | | |
| Oriental | 193 | 303 | 339 | 322 | 663 | 639 | 737 | 640 | 128,119 | 193,749 | 247,228 | 204,150 |
| TOTAL | - | - | - | - | - | - | - | - | 649,639 | 727,302 | 807,527 | 755,715 |

1/ Farm sales weight is about 10 percent above the average dry weight which is normally reported in export trade statistics. 2/ Preliminary. 3/ Less than 500 acres. 4/ Not available. 5/ One year only. 6/ Less than a five-year average. 7/ Includes some sun-cured that is also partially fire-cured. 8/ This is a flue-cured variety (Virginia). 9/ Includes shade grown wrapper which is fire-cured. 10/ Latakia - fire-cured.

Foreign Agricultural Service. Official estimates of foreign countries, reports from Agricultural Attaches and other U.S. representatives abroad, results of office research, and other information.

# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

JAN 14 1955
U. S. DEPARTMENT OF AGRICULTURE

FT 48-54 December 20, 1954

## TOBACCO PRODUCTION AND EXPORT SITUATION AS REPORTED IN NOVEMBER FROM THE "CANADIAN FEDERAL - PROVINCIAL AGRICULTURAL CONFERENCE OF 1954"

Introduction

Current developments in connection with Canadian tobacco production and export outlook are of vital interest to the U. S. tobacco industry. These are of special importance due to the influence that Canadian foreign shipments of leaf have on U. S. outlook for exports, especially to the United Kingdom, Australia and certain other countries. Because of this importance, the November tobacco report from the Canadian "Federal Provincial Agricultural Conference of 1954" is reproduced below.

"Supply - Stocks on hand of all types of tobacco in Canada on September 30, 1954, amounted to 159.0 million pounds. These stocks consisted of 136.5 million pounds of flue-cured, 8.8 million pounds of burley, 9.7 million pounds of cigar leaf, 1.9 million pounds of dark tobacco, 1.4 million pounds of pipe tobacco and 0.7 million pounds of other minor types. This represents a supply of 20.9 months at the current rate of consumption.

"The acreage of all types of tobacco harvested in Canada in 1954 is estimated at 132,000. Total production from this acreage is estimated to be 186.5 million pounds (farm sales weight) which is an increase of 34 percent over the production figure in 1953. The Flue-Cured Tobacco Marketing Association of Ontario allowed the planting of the full base acreage by their members in 1954 and in addition, production of flue-cured leaf by non-members of the Association, increased by 100 percent. The acreage agreed on by the Burley Tobacco Marketing Association was designed to produce 6 million pounds in 1954 as compared with 1.7 million pounds in 1953. (However, only two-thirds of the allotted acreage was planted and production was about 4.5 million pounds.)

"As a result of these increases, it is estimated that the stocks on hand at September 30, 1955, will be about 166.6 million pounds which is an increase of 6.6 million pounds or about 4.5 percent. These stocks represent a supply of approximately 19 months, which is slightly less than normal, at the estimated increased rate of consumption in 1954-55.

"Prices - Early in November, the directors of the Flue-Cured Tobacco Marketing Association of Ontario, agreed to a minimum average price of 42¼ cents per pound (exclusive of 2 cents per pound paid for sorting and tying) for the 1954 Ontario rop. This price represents a decrease of 3/4 cents from the price agreed upon for the previous year's crop and is the same as the minimum average price set for the 1952 crop. No information was available at the time of preparation of this statement on prices of other types, but no significant changes are expected.

"This all-time record crop of 1954 should have a total farm value of nearly $80 million ($83.2 million U. S. dollars).

"Exports - Exports from the 1954 crop of Canadian leaf will be substantially in excess of 1953-54 exports. Total exports may exceed 50 million pounds (export weight). As in the past, it is expected that the United Kingdom will take the greater portion with lesser quantities going to Australia, the British West Indies, and other countries.

"Should the anticipated figure of 50 million pounds be realized, it will be an all-time high for tobacco exports from this country.

"Manufacture - The total amount of tobacco of all types taken for manufacture in 1953-54, was 98 million pounds (redried weight), which is slightly above the figure for the previous year. With the continuance of favorable economic conditions, it is estimated that the industry will use about 106 million pounds (redried weight) of all types in 1955."

FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

JAN 14 1955
U. S. DEPARTMENT OF AGRICULTURE

FT 49-54

December 27, 1954

# CURRENT DEVELOPMENTS IN TOBACCO PRODUCTION AND TRADE OF NIGERIA INDICATE A FUTURE DECLINE IN IMPORTS FROM THE UNITED STATES

## Summary

The high import duties on tobacco and tobacco products together with plans for greatly expanding production seem to indicate that U. S. exports of leaf to this area are likely to decline or be eliminated entirely, even though consumption of tobacco products is rising rapidly. Domestic facilities for production of cigarettes are being greatly expanded.

## Introduction

Nigeria, which is a British Territory, is about one and one-fourth the size of Texas and has a population of approximately 32 million. Consumption of tobacco products, especially cigarettes, has been increasing rapidly in recent years. Domestic production of tobacco has expanded greatly, but imports of leaf tobacco also rose in order to meet increasing demand. Data for the first 8 months of 1954 indicate that a high level of imports has been maintained this year. Imports of cigarettes have declined as a result of increasing domestic output.

Because of the interest of U. S. tobacco exporters in developments in Nigeria, the following material is reproduced from a report "The Economic Development of Nigeria," by the International Bank for Reconstruction and Development, September, 1954.

## Production

"Nigerian conditions of climate and soil are favorable to tobacco. Its cultivation is an old practice and numerous types have become adjusted to the country's varying conditions. Stimulated by The Nigerian Tobacco Company, a subsidiary of The British-American Tobacco Company which started the manufacture of cigarettes in Nigeria in 1933, production of (improved types of) leaf tobacco increased sharply in recent years from 835,000 pounds in 1949 to about 3.36 million pounds in 1952, to an estimated 5 million pounds in 1953.

"There are three principal types of (Nicotiana Tabacum) tobacco. Northern (dark) air-cured tobacco comes chiefly from Zaria Province, with lesser quantities from Sokoto, Kano and Katsina Provinces. In parts of this area, where flooding occurs regularly (fadamas), a second or dry-season crop is planted as the water recedes. Such plantings, which produce better quality leaf, have increased considerably in recent years. Southern (light) air-cured tobacco comes entirely from Oyo Province in the Western Region around Ogbomosho and Oyo. The planted areas are somewhat scattered. (Production of this type is being increased very rapidly.) Flue-cured tobacco is grown only in the northwest portion of Oyo Province. (In addition to the above types, the natives produce 22 to 23 million pounds of Nicotiana Rustica - dark air-cured - which is largely used at home or processed and sold at 'native markets.' Output of this kind is expected to decline as production of other types expands and consumer demands change.)

"For the last few years, the tobacco company (indicated above) has pursued a price policy designed to encourage improvement in quality. It raised the price of grade I tobacco by 50 to 150 percent but left the price of grade III unchanged. As in the case of palm oil, this incentive for quality improvement has been highly successful. It is unlikely that tobacco will be exported for many years to come. Substantial improvement in quality would be required to make Nigerian tobacco competitive in the markets of the tobacco importing countries. However, there is a growing demand in Nigeria for better quality tobacco, which is now imported; increased domestic output of higher grade leaf can come to supplant imports.

Survey and Research

"The effective technical reconnaissance and experimental work done by the Nigerian Tobacco Company, in advance of its efforts to promote expanded production contributed greatly to the rapid success of those efforts. It demonstrates the practical value of such investigations for new agricultural projects generally.

"In 1953, the Nigerian Tobacco Company engaged in experimental work at Gombe, east of Bauchi, and in a wide area of the Middle Belt, north of the Niger and on both sides of the Benue.

"Tobacco seedlings are grown by arrangement in village communal nurseries. The company selects and pegs out the seed beds, usually some 60 to 100 to a village. The timing of fadama nursery seedlings is staggered to follow up the water as it recedes. Incentive payments are made to assure proper nursery bed supervision and maintenance. Seedlings are distributed free for the first three years in a new area and the farmers are then persuaded to grow their own seedlings.

"Some disease has appeared, leaf curl being the most serious. (Current reports indicate that output of dark leaf, Nicotiana Tabacum, is decreased sharply in 1955 due to a severe epidemic of this disease.) Future needs for technical work on disease control, varietal and agronomic improvement, soil fertility maintenance, and the place of the tobacco crop in permanent agriculture in different localities should be met adequately by the proposed strengthening of technical agricultural services through the proposed agricultural research institute and the regional departments of agriculture."

Nigeria: Acreage of tobacco by kind, 1948-49 - 1954-55

| Kind | 1948-49 | 1949-50 | 1950-51 | 1951-52 | 1952-53 | 1953-54 1/ | 1954-55 1/ |
|---|---|---|---|---|---|---|---|
| | acres | acres | acres | acres | acres | acres | acres |
| Nicotiana Tabacum: | | | | | | | |
| Dark air-cured | 950 | 2,206 | 4,280 | 7,770 | 8,200 | 8,900 | 2/ |
| Light air-cured | 1,035 | 734 | 1,029 | 1,327 | 2,200 | 3,700 | 7,000 |
| Flue-cured | 435 | 740 | 830 | 863 | 830 | 870 | 950 |
| Nicotiana Rustica: | | | | | | | |
| Dark air-cured (peasant) 3/ | 55,000 | 55,000 | 55,000 | 55,000 | 55,000 | 55,000 | 50,000 |
| TOTAL | 57,420 | 58,670 | 61,139 | 64,960 | 66,230 | 68,470 | 2/ |

1/ Estimated on basis of average yields.
2/ Not available.
3/ No accurate data are available for "peasant" production.
Source: Nigerian Tobacco Company and reports from U. S. foreign service officers.

Nigeria: Production by kind of tobacco, 1948-49 - 1954-55

| Kind | 1948-49 | 1949-50 | 1950-51 | 1951-52 | 1952-53 | 1953-54 | 1954-55 1/ |
|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Nicotiana Tabacum: | | | | | | | |
| Dark air-cured | 301 | 739 | 1,315 | 2,210 | 2,500 | 2,580 | 760 2/ |
| Light air-cured | 362 | 335 | 412 | 670 | 1,100 | 1,550 | 3,000 |
| Flue-cured | 163 | 349 | 400 | 333 | 350 | 380 | 270 |
| Nicotiana Rustica: | | | | | | | |
| Dark air-cured (peasant) 3/ | 22,500 | 22,500 | 22,500 | 22,500 | 22,500 | 22,500 | 20,150 |
| TOTAL | 23,326 | 23,923 | 24,627 | 25,713 | 26,450 | 27,010 | 24,180 |

1/ Forecast.
2/ The expected decrease is due to an epidemic of leaf curl in the Western Region
3/ No accurate data are available for "peasant" production.
Source: Nigerian Tobacco Company and reports from U.S. foreign service officers.

Imports of Unmanufactured Tobacco

While domestic production of tobacco has increased greatly in recent years, total imports have also risen in order to meet increased demands, particularly for cigarettes.

Imports of flue-cured from Southern Rhodesia and India have risen significantly in the last five years, while takings of this kind of U.S. leaf have increased slightly. Imports of Black-Fat (semi-processed Kentucky fire-cured) continue to decline. Takings of U. S. One Sucker rose sharply to an annual average of 1.25 million pounds in the 1949-52 period, but declined to 610,000 pounds in 1953, and further to 200,000 pounds in the first eight months of 1954.

Extensive efforts are being made to increase domestic production of cigarette tobaccos and reports indicate that these are likely to be successful, although there are many problems to be overcome in order to successfully produce high quality leaf.

Nigeria: Imports of unmanufactured tobacco by principal countries of origin, average 1935-39 and 1947-51, annual 1952 and 1953

| Country of Origin | Average 1935-39 | Average 1947-51 | 1952 | 1953 |
|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United States | 2,864 | 3,591 | 4,501 | 3,681 |
| Southern Rhodesia | 1/ | 889 | 3,288 | 858 |
| India | 1/ | 273 | 994 | 1,125 |
| United Kingdom | 16 | 2/ | 8 | 1/ |
| Nyasaland | 12 | 6 | 5 | 1/ |
| Others | 27 | 56 | 7 | 26 |
| TOTAL | 2,919 | 4,815 | 8,803 | 5,690 |

1/ If any, included in others.
2/ Less than 500.

Source: Trade Reports of Nigeria and Trade Summary of Dec., 1953.

U. S. exports of unmanufactured tobacco to Nigeria by kind, averages 1935-39, 1947-51, annual 1952, 1953 and Jan-Aug 1954

| Type | Average 1935-39 | Average 1947-51 | 1952 | 1953 1/ | Jan-Aug. 1954 1/ |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-Cured | 210 | 856 | 1,004 | 1,199 | 408 |
| Burley | 5 | - | - | 2 | - |
| Kentucky-Tennessee | 19 | 39 | 10 | 4 | 5 |
| Black Fat | 2,687 | 2,006 | 1,426 | 2,055 | 1,552 |
| One Sucker | 5 | 800 | 1,152 | 610 | 200 |
| Green River | - | 4 | 9 | 13 | - |
| Cigar Leaf | 1 | 6 | - | - | - |
| TOTAL | 2,927 | 3,711 | 3,601 | 3,883 | 2,165 |

1/ Preliminary
Source: Compiled in the Foreign Agricultural Service from records of the Bureau of the Census.

Present indications are that imports are likely to decline in the next few years as efforts to expand domestic output of leaf are expected to be successful, although as indicated above, consumption is expanding and many problems are still to be overcome in order to produce high quality tobacco.

## Production of Tobacco Products

The following is from a report by the International Bank for Reconstruction and Development entitled, "The Economic Development of Nigeria," September 1954:

"Both cigars and cigarettes are made locally. The former are hand-rolled in a variety of shapes and enjoy a steady sale at their low prices. The combined output of the several African-owned factories is still extremely small. The market is also small. Nigerian smokers show a strong preference for cigarettes, either machine-made or the coarse, hand-rolled 'bookies' sold in the village market at 10 for a penny." ("Bookies" are crudely-made cigarettes containing low grade tobacco. They are made by hand, twirling a bit of newspaper tissue paper or similar material around a stick of appropriate size. One end of this paper cylinder is closed and the tobacco is poured into it. "Bookies" are made chiefly of tobacco stems and herbs which are frequently crushed with the fingers. The center of this industry is in Sokoto Province.)

"Nigeria's single cigarette factory at Ibadan is one of the country's most modern and progressive industries. Highly mechanized, it employs 630 workers and 50 trainees, and supplies over 95 percent of the machine-made cigarettes consumed locally. Its present capacity is roughly 2,500 million cigarettes per year.

"With its own training centers and a staff of about 100 African agricultural extension agents, it has been largely responsible for development of Nigerian tobacco cultivation. The local tobacco, grown by independent farmers with the company's help and advice, already provides some 40 percent of the factory's raw material. One of its brands is made entirely from Nigerian leaf; the others are blended with imported tobacco.

"Transportation is a major problem for this industry. Not only is access to potential tobacco-producing areas difficult, but distribution costs are affected. As the market expands, decentralized production will offer a partial answer. Construction of a second factory at Port Harcourt is about to begin and a third is planned for the Northern Region."

There is moderate consumption of cigars and pipe tobacco, and snuff is used by many of the natives. Black Fat is imported primarily for use in pipes and for chewing by the native Nigerians, but use of these products is declining as consumer preferences change and incomes rise.

Much of the tobacco consumed by natives in rural areas and small villages is grown on small plots and usually is not included in production and consumption statistics, but an attempt is being made to secure current estimates for these segments of the industry.

Import Duties

Nigeria: Import duties unmanufactured leaf and manufactured products, November 1954

| Kind | Units | Local Currency | U.S. Currency Equivalent |
|---|---|---|---|
| | | | Dollars |
| Unmanufactured tobacco | Per Pound | Ten Shillings | 1.40 |
| Manufactured Products: | | | |
| Cigars | Per 100 pieces | One Pound | 2.80 |
| Cigarettes | Per Pound | One Pound and ten shillings | 4.20 1/ |
| Other Products (Including Snuff) | Per Pound | Six Shillings and six pence | 0.91 |

1/ Equivalent to 21 U. S. cents per pack of 20 cigarettes.
Source: U. S. Department of Commerce.

From data in the table above, it is obvious that the import duties are sufficient to greatly stimulate domestic production of leaf and manufactured products, while imports are discouraged.

Imports of Manufactured Products

There are fairly large imports of cigarettes, mostly from the United Kingdom, as demand has increased faster than domestic consumption, but imports have declined substantially from levels of the 1947-51 period and are expected to decrease sharply in the next year or two as domestic facilities expand. Imports of cigars, smoking tobacco and other tobacco products (mostly from the United Kingdom) are small and the levels have been relatively constant during the past 15 years.

Nigeria: Imports of manufactured tobacco by kind and principal countries of origin, averages 1935-39 and 1947-51, annual 1952-53

| Kind and Country of Origin | Average 1935-39 1/ | Average 1947-51 | 1952 | 1953 |
|---|---|---|---|---|
| | 1,000 pounds | | | |
| Cigars | | | | |
| United Kingdom | 0.4 | 0.1 | 0.6 | 1.3 |
| Netherlands | 0.7 | 0.8 | 0.3 | 0.5 |
| Other | 2/ 1.6 | 0.3 | 0.1 | 0.3 |
| Total | 2.7 | 1.2 | 1.0 | 2.1 |
| Cigarettes | | | | |
| United Kingdom | 853 | 1,152 | 188 | 917 |
| Other | 2 | 2 | 3/ | 1 |
| Total | 855 | 1,154 | 188 | 918 |
| Other Manufactured | | | | |
| United Kingdom | 8 | 11 | 13 | 10 |
| Other | 1 | 1 | 3/ | 3/ |
| Total | 9 | 12 | 13 | 10 |

1/ Less than 5-year average. Data for 1936 not available.
2/ Includes 672 pounds for Germany. 3/ Less than 500 pounds.
Source: Trade Reports of Nigeria and Nigeria Trade Summary, Dec.,1953.

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December 30, 1954

# MISCELLANEOUS TOBACCO DEVELOPMENTS

## Philippines Issues Import Licenses for Cigarette Leaf

The United States Embassy at Manila reports that licenses were released December 3, 1954 for the import of 7.9 million pounds of cigarette tobacco. Importers were not required to sign a penalty contract.

## Sweden Eases Dollar Tobacco Imports

The Swedish Ministry of Trade has announced that requests for the import of items at present on the "Transit" dollar list will be more favorably considered than has been the case previously. Tobacco, which is on this list, must still be bought with "Transit" dollars or through a triangular transaction. However, imports of both tobacco leaf and products should be facilitated by a more tolerant review of requests for tobacco import licenses.

## Current Situation in Mexico's Tobacco Industry

Mexican imports of unmanufactured tobacco from the United States have risen sharply this year. U. S. export figures for the first 7 months of 1954 are 62 percent above total shipments of unmanufactured tobacco to Mexico in the entire year 1953. This is probably the result of the action of the Mexican Government in limiting imports of cigarettes. Cigarette imports will be limited to 15 percent of 1953 cigarette imports from 1954 until the foreign exchange situation improves. Existing demand for American type cigarettes seems to be encouraging importation of American leaf to be manufactured in Mexico.

U. S. Exports of Unmanufactured Tobacco to Mexico
by Type and Value

| Type | 1952 | | 1953 | | Jan-August 1954 | |
|---|---|---|---|---|---|---|
| | Pounds | Value | Pounds | Value | Pounds | Value |
| | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars |
| Flue-Cured | 738 | 790 | 1,326 | 1,197 | 1,335 | 1,018 |
| Burley | 2,214 | 1,445 | 1,510 | 1,009 | 3,243 | 1,790 |
| Maryland | - | - | - | - | 34 | 30 |
| Cigar Leaf 1/ | 6 | 9 | 9 | 17 | 3 | 10 |
| Total | 2,958 | 2,244 | 2,845 | 2,223 | 4,615 | 2,848 |

1/ Mostly shade grown wrapper.

The U. S. Embassy at Mexico City reports that no import restrictions have been applied on leaf tobacco from the U. S. Dollar exchange has been readily available and there is no exchange control.

About 4.0 million pounds of flue-cured tobacco and about 1.8 million pounds of Burley are grown in Mexico. Total use of all tobacco is near 70.5 million pounds per year; approximately 98.5 percent is used for cigarette manufacture. Total production of cigarettes in 1953 was 1,391 million packages from 30 factories. Seven of these factories are of appreciable size and turn out most of the cigarettes sold.

Cigarettes produced fall into three classes: the dark cigarettes made entirely from dark domestic leaf, cigarettes made of light Mexican leaf and light cigarettes made at least in part from imported tobacco. The dark domestic cigarettes are much less expensive (2.4 - 7.2 U. S. cents per pack) and therefore more popular. There is a steadily increasing demand, however, for the higher priced (7.2 - 12.8 cents) light blends. Retail sales prices are fixed by the Government and it is possible that price increases may be authorized.

## Indonesia Produces Record Flue-Cured Crop

The latest estimate on production of Virginia-type tobacco in Indonesia indicates a record production of 17.6 million pounds from 30.9 thousand acres. Production of Virginia-type has been encouraged by the Government of Indonesia to reduce foreign exchange requirements for the import of flue-cured tobacco.

Lack of reliable production statistics has made it difficult to keep in touch with this situation but production apparently has risen from the 1947-51 average of 350 thousand pounds to 9.9 million pounds in 1953 with this year's crop predicted at the record 17.6 million pounds.

There is still some question as to whether or not this crop and the estimated 25 percent increase for 1955 means that Indonesia will soon produce all of the flue-cured tobacco it needs. A question that concerns many manufacturers is whether enough tobacco of the proper grades can be produced. Many believe that a large enough crop can be produced but also feel that some flue-cured must be imported to maintain the present quality of their blends as Indonesia's soil and climate are not believed suitable for a large crop of the better grades. The United States supplies most of the leaf they import. During the first half of 1954, 6.2 million pounds or about 93 percent of total leaf imports were from the United States.

Due to a critical balance of payments position the Indonesian Government plans to limit imports of tobacco in the 1954-55 fiscal year [1] to about one-half of normal usings. In the following year 1955-56 a further reduction is planned that will limit imports to one-fourth of normal usings of imported tobacco. If this program is carried through as planned, it will probably drastically restrict the production of cigarette brands using a large percentage of flue-cured tobacco.

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[1] September 1, 1954 to August 31, 1955

U. S. Exports of Unmanufactured Tobacco to Indonesia by Type:
Quantity and Value

| Type | 1951 | | 1952 | | 1953 | | Jan-Aug 1954 1/ | |
|---|---|---|---|---|---|---|---|---|
| | Quantity | Value | Quantity | Value | Quantity | Value | Quantity | Value |
| | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars |
| Flue-Cured | 11,720 | 7,449 | 13,203 | 8,574 | 12,475 | 8,316 | 7,662 | 5,171 |
| Burley | 205 | 70 | 4 | 2 | - | - | - | - |
| Ky-Tenn | 243 | 163 | 87 | 35 | 520 | 338 | 440 | 289 |
| Total | 12,168 | 7,682 | 13,581 2/ | 8,796 2/ | 12,995 | 8,654 | 8,102 | 5,460 |

1/ Preliminary. 2/ Contains 287 thousand pounds of Green River valued at 185 thousand dollars.

In addition to being an important market for United States leaf, Indonesia sells tobacco on the world market. Below is an estimate of the amount of the main types of Indonesian tobacco that will enter foreign trade in 1955:

| Type | Usual Destination | Thousand Pounds |
|---|---|---|
| Deli | U. S. and Holland | 6,614 |
| Vooroogst | Germany | 2,205 |
| Naoogst | Holland | 7,716 |
| Voorstenlanden | Holland | 661 |

## Austria's 1954-55 Tobacco Import Program

The Austrian Tobacco Monopoly is planning to purchase about 22.0 million pounds of unmanufactured tobacco at prices equivalent to U.S. $12,500,000 during the 1954-55 (July 1, 1954 - June 30, 1955) fiscal year. Present plans call for tobacco purchases to the amount of $3,500,000 from the United States, $6,600,000 from Greece and Turkey, $300,000 from Brazil and $2,100,000 from other countries.

A general decrease in the sales of manufactured tobacco products has been under way since the Monopoly increased prices January 1, 1954. Estimates of leaf usage, based on sales, for the 1953-54 fiscal year are down to 19.0 million pounds, a drop of about .9 million pounds from the preceding year. Utilization of leaf tobacco will probably drop further during 1954-55. The Monopoly seems to be taking advantage of lowered consumption to increase stocks. Planned imports of 22.0 million pounds less 1.1 million pounds shipped to the Monopoly plant at Munich will be about 2.2 million above estimated Austrian requirements. In addition 1.3 million pounds is expected from the 1954 domestic crop.

Calculated stocks of leaf tobacco increased from approximately 24.9 million pounds on July 1, 1953 to 26.2 million pounds June 30, 1954. The planned surplus this year will raise stocks to about 29.8 million pounds by June 30, 1955.

U. S. Exports of Unmanufactured Tobacco to Austria by Types:
Quantity and Value

| Type | 1951 | | 1952 | | 1953 | | January-August 1954 | |
|---|---|---|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars | 1,000 pounds | 1,000 dollars |
| Flue-Cured | 2,097 | 1,085 | 3,380 | 1,546 | 2,055 | 1,058 | 1,106 | 636 |
| Burley | 1,136 | 418 | 1,204 | 448 | 850 | 377 | 365 | 215 |
| Va. Fire-Cured | 420 | 302 | 416 | 315 | 215 | 163 | 64 | 52 |
| Kentucky-Tenn | 50 | 30 | 20 | 15 | - | - | 28 | 23 |
| Maryland | 25 | 20 | - | - | - | - | - | - |
| Cigar Wrapper | 119 | 182 | - | - | 36 | 82 | 9 | 16 |
| Cigar Binder | 226 | 214 | 157 | 180 | 142 | 176 | 51 | 62 |
| Total | 4,073 | 2,251 | 5,177 | 2,504 | 3,298 | 1,856 | 1,623 | 1,004 |

## Bolivian-Yugoslav Trade Agreement

The American Embassy at La Paz reports that Bolivia and Yugoslavia signed a trade agreement October 8, 1954. It provides for the exchange of about U. S. $500,000 in commodities and "favored nation" treatment. The agreement is to extend one year from the date of signing and will be automatically renewed if neither nation objects. Tobacco was listed as one of the agricultural products which Yugoslavia will ship to Bolivia.

## Iraq Expects Larger Tobacco Crop This Year

Preliminary estimates place this season's tobacco crop in Iraq at 17.6 million pounds compared with 15.9 million pounds a year ago. Domestic consumption is expected to take about 15.4 million pounds with 2.2 million going into surplus. Present plans are to store this surplus as a reserve to provide for increasing consumer demand.

## U. K. to Purchase More Canadian Tobacco

Manufacturers are now starting negotiations for the purchase of this year's bumper Canadian flue-cured crop and indications are that the price will be slightly lower than that received last year. Overseas importers are said to be planning large purchases at this lower price. The British Board of Trade has agreed to increase dollar allocations for the purchase of Canadian tobacco this year, with the understanding that the increases may, if necessary, be deducted from next year's dollar allotments. Press reports state that the United Kingdom bought 12 million dollars worth of Canadian tobacco last year and purchases this year may rise to more than 18 million dollars.

## Algeria Expects Smaller Tobacco Crop

The tobacco crop in Algeria is estimated at 19 percent lower for 1954 than the record crop of 1953. This was due to a combination of two circumstances: acreage was lowered 13 percent for this year's crop and the yield per acre was lower. The Algerian crop this year, as in previous years, was composed primarily of dark air-cured and sun-cured tobaccos.

### Area Planted and Production of Leaf Tobacco in Algeria (Not Including Chewing)

| | 1952 | 1953 | 1954 |
|---|---|---|---|
| 1,000 acres | 70 | 84 | 74 |
| 1,000 pounds | 44,967 | 62,919 | 50,706 |

Algeria's exports of leaf tobacco have been greatly stimulated by the record 1953 crop, permitting the shipment of more tobacco to France in the first 9 months of 1954 than the total exports to all countries in 1953.

### Algeria: Exports of Leaf Tobacco by Country of Destination

| Country of Destination | 1952 | 1953 | (Jan.-Sept.) 1954 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| France | 15,859 | 21,815 | 27,961 |
| Belgium-Luxemburg | 24 | - | 4 |
| French Union | 4,306 | 4,657 | 2,555 |
| Other | 3,442 | 1,133 | 2,209 |
| Total | 23,631 | 27,605 | 32,729 |

## Finland's Unmanufactured Tobacco Imports from the U. S. Continue Rising in 1953

In spite of slightly lower total imports of unmanufactured tobacco in 1953, Finland took 3.3 million pounds from the United States in 1953 compared with 3.2 million pounds in 1952. This is a result of the increasing popularity of blended cigarettes containing a large percentage of U. S. tobaccos. Consumption of this type of cigarette increased in 1953, bucking the trend of an overall decrease in cigarette consumption due to unfavorable conditions in Finland during 1953.

### Finland: Imports of Unmanufactured Tobacco by Countries of Origin

| Country | 1938 | 1950 | 1951 | 1952 | 1953 |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United States | 1,704 | 2,311 | 2,776 | 3,239 | 3,320 |
| Greece | 3,640 | 2,574 | 3,208 | 3,644 | 3,543 |
| Turkey | 1,680 | 1,767 | 1,713 | 1,914 | 2,092 |
| U.S.S.R. | - | 817 | 877 | 829 | 564 |
| Brazil | - | - | 267 | 172 | 179 |
| Others | 1,581 | 1,557 | 945 | 727 | 553 |
| Total | 8,605 | 9,026 | 9,786 | 10,525 | 10,251 |

## Exports of U. S. Leaf to French Morocco Lower in 1953

Exports of United States leaf to French Morocco in 1953 totaled 289 thousand pounds, a drop of about 34 percent from the 435 thousand pounds shipped in 1952. This follows the declining trend of our tobacco exports to Morocco since the immediate postwar period. A major cause for this has been the shortage of dollars that could be spent for tobacco, as the case has been in many other countries. If the tentative French allocation of $750,000 for the purchase of dollar tobacco is carried out as planned, an increase in French Moroccan purchases of United States leaf can be expected. The allocation is planned to cover the period July 1, 1954 through June 30, 1955.

Exports of U. S. Unmanufactured Tobacco to Morocco

| Kind | 1947-51 | 1952 | 1953 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Flue-Cured | 175 | 157 | 87 |
| Burley | 50 | - | - |
| Kentucky-Tennessee | 182 | - | - |
| Virginia Fire-Cured | 6 | - | - |
| Black-Fat | 1 | - | - |
| Maryland | 402 | 278 | 202 |
| One Sucker | 60 | - | - |
| Cigar Leaf | 183 | - | - |
| Total | 1,059 | 435 | 289 |

## Philippine Trade Negotiations Affecting Tobacco

Several provisions of the agreement signed by the United States and Philippine Trade Delegations on December 15 will, if ratified, affect the United States tobacco industry. This agreement is expected to be submitted to the Congresses of the two countries for ratification in the next few months.

Article II of the agreement would permit the President of the Philippines to impose a quota on imports of tobacco if investigation indicated that imports were causing or threatening a serious injury to Philippine tobacco producers. Any quota imposed for any twelve-month period, for the purpose of protecting domestic industry, shall not be less than the amount determined by the President of the Philippines as the total amount which, during the twelve months preceding entry into effect of the quota, was entered, or withdrawn from warehouse for consumption, after deduction of the amount by which he finds domestic production can be increased during the twelve-month period of the quota. If the quota is established for any period other than a twelve-month period, it shall not be less than a proportionate amount.

The Article further provides that an opportunity shall be given this country to consult before such a quota is imposed. However, this right of consultation does not imply that the consent of this country is required before the quota may be put into effect.

The table below summarizes the schedules of U. S. tariff-free quotas on imports of Philippine leaf tobacco and cigars and the proportion of the Philippine tariff on tobacco that may be imposed during the life of the agreement.

Table of Quotas and Tariff Agreements between the United States and the Philippines Republic on Manufactured and Unmanufactured Tobacco

| Period | Percentage of Philippine Leaf and Cigars that may be imported into the U. S. duty-free | Percentage of Tariff that the Philippines may impose on U. S. leaf. |
|---|---|---|
| 1956-58 | 95 3/ | 25 |
| 1959-61 | 90 | 50 |
| 1962-64 | 80 | 75 |
| 1965-67 | 60 | 90 |
| 1968-70 | 40 | 90 |
| 1971-73 | 20 | 90 |
| 1974 | 0 | 100 |

1/ Based on the present quota of 200 million cigars and 6.5 million pounds of scrap and filler tobacco that may enter the United States duty-free

2/ Based on the 1909 tariff rate of U. S. $4.08 per pound. There is a proposal to reduce this rate substantially.

3/ There is no absolute quota under the new agreement, however all products that enter in excess of these quotas will be taxed at the lowest rate applicable to other countries: Cigars, U. S., $1.50 per pound plus 10% ad valorum. Unstemmed cigar filler and scrap - U. S. $0.14 per pound.

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